



# CAPTRUST



University System  
of Georgia **Benefits**  
*Centered on You.*

## HERE TO HELP YOU

EXPERT ADVICE ON YOUR 403(B)/457(B) PLAN AND RETIREMENT  
PLANNING NEEDS

CAPTRUST Financial Advisors is an independent financial advisory firm that works with USG's Retirement Plan Committee and Retirement Plan Participants. USG employees who need help navigating their retirement benefits and other financial priorities (i.e. budgeting, debt, credit, college savings) can rely on CAPTRUST's participant advice program.

Topics covered in the thirty-minute individual advisory sessions include, but are not limited to the following:

- Retirement and general financial planning
- Investment education and advice

You also will have an opportunity to create a **Retirement Blueprint**, CAPTRUST's interactive retirement readiness and financial planning tool. USG employees can earn **4,000 USG Well-Being points** for completing a Retirement Blueprint with a CAPTRUST financial professional.

These one-on-one advice sessions are offered to you solely as a benefit; be assured that CAPTRUST's role is not to sell you anything, but purely to help you make sound investment decisions.

### How Do I Schedule an Appointment?

CLICK: [www.captrustadvice.com/scheduler/](http://www.captrustadvice.com/scheduler/)

1. Click [www.captrustadvice.com/scheduler/](http://www.captrustadvice.com/scheduler/) and scroll down to the calendar.
2. Choose the day and 30-minute session you wish to attend.
3. Enter your information and click **Schedule It**. A confirmation email will then be sent immediately.
4. A reminder email will also be sent 24 hours in advance of the meeting.
5. If you need to cancel or change your meeting time, click the link received in the confirmation/reminder email. Then enter your last name and confirmation number.
6. CAPTRUST will call you at the number provided at the time of your appointment and does have video/screensharing capabilities, if desired.
7. If you have any questions or need assistance, please call CAPTRUST at 800.967.9948.

To be best prepared for these sessions, please make sure you have the information you want to include in your Blueprint calculations, such as USG retirement account balances and your current contributions to your USG retirement accounts. You will also want to bring login information for your USG retirement website.