CAPTRUST

University System of Georgia Benefits

# HERE TO HELP YOU

## FIDUCIARY ADVICE ON YOUR USG SUPPLEMENTAL RETIREMENT PLANS AND FINANCIAL WELLNESS NEEDS

CAPTRUST Financial Advisors, the independent financial advisory firm that works with USG's Supplemental Retirement Programs, will be onsite conducting individual financial planning meetings:

| Date | Location | Meeting Room |
|---|---|---|
| April 9th | Georgia College & State University – 131 S. Clarke Street, Milledgeville, GA | Wooten-Garner House, HR Conference Room |

Topics covered in the forty-five-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 tool. The Blueprint is an unbiased, comprehensive financial plan that will help an employee to answer some difficult questions such as:

- Am I on track for retirement?
- How much do I need to save?
- How should I invest my money?
- When can I retire?
- How long will my money last?

To learn more about the Blueprint you can view a short, informative video by clicking here.

These one-on-one 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.

Click here to schedule an appointment

## How Do I Schedule an Appointment?

1. Click "Georgia College & State University 1:1's –" and then click continue at the bottom.
2. Choose the 45-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. 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 discussion such as your USG retirement account statements and login information for your USG retirement accounts at either Corebridge Financial (formerly AIG), Fidelity, and/or TIAA. Feel free to include your spouse in your meeting and any other financial information you would like to review or include in your discussion. If you can't make a live session, please schedule an appointment with the CAPTRUST Advice Desk by visiting www.captrustadvice.com.