FINANCIAL WELLNESS AND ADVICE

CAPTRUST advice team members are available in person, on the phone, and via the web. On-site group meetings and live web events are also available. Our goal is to help make sure employees feel confident about their paths to retirement.

MANY WAYS TO ENGAGE

- On-site group and individual meetings
- Consultations with an advisor by phone
- Live webinars
- Monthly e-newsletters
- Our advice website, captrustadvice.com

CAPTRUSTADVICE.COM

Employees can access a range of resources at our advice website:

- Schedule an appointment with a financial advisor
- Access helpful articles on a range of topics
- Check progress with nine financial calculators
- Watch short videos from CAPTRUST subject matter experts
- Register for topical financial webinars
- View recordings of past webinars

CAPTRUST is here to help you plan, save, invest, and retire comfortably.

RETIREMENT BLUEPRINT

- CAPTRUST's Retirement Blueprint® technology allows our financial advisor to deliver personalized retirement planning advice over the phone, on-site, or in a group setting
- Financial advisor guide employees in identifying their goals and risk tolerance
- What-if scenario planning allows retirement strategies to be optimized for the individual
- Employees can implement advice on the spot with assistance from the financial advisor
- Each Blueprint is delivered directly to the employee
- Annual reminders are sent to employees to encourage continuous engagement and to remind them to update their information

FINANCIAL WELLNESS

- America's diverse workforce is looking for help in addressing difficult financial challenges—from managing student loan debt to securing retirement
- CAPTRUST's financial wellness and advice services meet employees where they are, with the help they need to answer their most pressing questions. Help is available in person, over the phone, or online

Sources: PwC, "Employee Financial Wellness Survey: 2017 Results," 2017; Financial Engines and Aon Hewitt Study, "Help in Defined Contribution Plans: 2006 through 2010," 2011; *Corporate Wellness Magazine*, "Beyond the Paycheck: When Does a Financial Wellness Program Make Sense?"

CAPTRUST

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