



CAPTRUST Financial Advisors – A Financial Wellness Benefit

Expert Advice to Help You Retire with Confidence and Avoid Financial Stress

To help you build a solid financial future, we have hired CAPTRUST as a resource to help you with your important financial decisions. Improving your financial wellness is one of the top concerns of the Diocese of Gary. Employees who need help navigating their retirement benefits and other financial priorities can rely on CAPTRUST'S participant advice program. To learn more about the firm, visit www.captrustadvice.com.

Is this advice part of my benefits package?

Yes, CAPTRUST is here to provide you with professional, unbiased advice. CAPTRUST will not sell you any products – their services are made available as part of the Diocese of Gary's retirement plan benefits package.

When should I call CAPTRUST?

- Assistance with enrolling and selecting/reviewing investments
- Creating a financial plan
- Deciding how much you should contribute to your retirement plan
- Determining the difference between Roth and Pre-tax contributions and which one is right for you

When should I call VOYA?

- Changing your investment selections or paycheck deferrals either online or over the phone
- Enrolling online or over the phone
- Distribution or loan transactions
- Obtaining plan highlights, personal performance, and statements
- Updating beneficiaries and other personal information

CONTACT YOUR LOCAL CAPTRUST ADVISORS (219) 926-1182

- Chris Ylo Chris.Ylo@captrust.com
- Chris Frain Chris.Frain@captrust.com
- Kirk Futrell Kirk.Futrell@captrust.com
- Mike DeLeon Michael.DeLeon@captrust.com
- If you are unable to reach any of the local advisors, you can reach someone else on the team by going to www.captrustadvice.com and scheduling an appointment online. The phone number is 800-967-9948

KEY CONTACT INFORMATION FOR YOUR PLAN:

DIOCESE OF GARY (Plan Sponsor) HR: Kelly Venegas | (219) 769-9292 x 224 | KVenegas@dcgary.org
VOYA (Recordkeeper) | (800) 584-6001 | <https://voyaretirementplans.com>
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