HERE TO HELP YOU

EXPERT ADVICE ON YOUR RETIREMENT AND FINANCIAL WELLNESS NEEDS

The University System of Georgia has partnered with CAPTRUST Financial Advisors, an independent financial advisory firm, to provide dedicated virtual advisory sessions to help address your financial concerns, improve your financial wellness and work with you on your retirement goals.

In the 45-minute advisory sessions, CAPTRUST can help you answer questions such as:

- Are you on the path towards financial wellness?
- How do you create a budget?
- Will you have enough money to retire?
- Do you have the appropriate investment mix?

You also have an opportunity to create a Retirement Blueprint, CAPTRUST's interactive retirement readiness tool. To learn more about the Blueprint, you can view a short, informative video by clicking here.

The one-on-one virtual sessions are part of your benefits, so you can be assured that CAPTRUST wants to help you make sound investment decisions.

Click here to schedule an appointment

How Do I Schedule an Appointment?

1. Click on the **USG – Dedicated Virtual Consultations** meeting box in the center of page then click **Continue** on bottom right.
2. Select the time you wish to schedule from the drop-down menu on the calendar; click **Continue**.
3. Enter your contact information and click **Schedule It** at the bottom right. A confirmation email will then be sent immediately. A reminder email will also be sent 24 hours in advance of the meeting.
4. 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.
5. If you have any questions or need assistance, please call CAPTRUST at 800.967.9948.

CAPTRUST will call you at the time of your appointment and does have video/screensharing capabilities. To best be prepared for these sessions, please make sure you have the information you want to include in your discussion or Blueprint calculations, such as retirement account balances and current contributions to retirement accounts. You will also want to have login information for your retirement or other accounts.

If you cannot make a session during these dates, but still want to create a Blueprint or need further advice, the CAPTRUST Advice Desk is also available. Appointments can be made with the Advice Desk by visiting www.captrustadvice.com or call 800-967-9948 Monday – Thursday from 8:30 a.m. to 5:30 p.m. Eastern time, Friday from 8:30 a.m. to 4:00 p.m. Later appointment options may be available for pre-scheduled appointments.