# HERE TO HELP YOU

## EXPERT ADVICE ON YOUR RETIREMENT AND FINANCIAL WELLNESS NEEDS

CAPTRUST Financial Advisors, the independent financial advisory firm that works on the University System of New Hampshire Retirement Plans, will be providing virtual consultations beginning **October 20th through November 7th**.

Topics covered in the 45-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. 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. Choose the date then the time that works for you. Click Next
2. Enter your information and click **Schedule Event**. A confirmation email will then be sent immediately.
3. 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.

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

If you cannot make a live session but still want to create a Blueprint or need further advice, the CAPTRUST at Work Desk is also available. Appointments can be made with the At Work Desk by visiting www.captrustatwork.com.