Please note: This is an AI generated transcription - there may be slight grammatical errors, spelling errors and/or misinterpretation of words.

Your CAPTRUST at Work Benefit

As part of your Employee Benefit Package, you are provided with a comprehensive suite of products and services, including some that are focused on improving your financial wellness. One of these is CAPTRUST at Work.

CAPTRUST at Work provides comprehensive and tailored financial guidance to help you meet your unique needs and personal goals. Our library of content covers a wide range of topics, from budgeting and managing student loans to understanding and optimizing employee benefits and making smart investments. This content caters to people in different career stages, early, middle, or late.

That way, no matter where you are on your financial journey, we've got you covered. Plus, we offer flexible delivery methods, including webinars, workshops, articles, videos, and more. CAPTRUST at Work meets you where you are. We also provide a suite of personal finance tools, including our retirement gap analysis, goal planning, and for people with especially complex financial situations our proprietary financial planning software.

These tools, which are available on both mobile and desktop, can help you make more informed financial decisions to reach your short- and long-term goals. We understand that financial health varies from person to person. That's why we also offer one on one guidance, so you can work with a financial advisor on your specific needs.

Through this service, you can ask us questions related to your retirement plan and investment options, your stock options, healthcare benefits, and more. At CAPTRUST, your goals are our goals. We start by understanding your employee benefits and identifying your best path to retirement and wealth. Our personalized onboarding sessions help us get to know you.

Then we use a data driven approach to refine our services as we learn about you. This ensures every communication is optimized and customized and that you receive evidence-based guidance tailored to your needs. The result? Financial wellness that reduces finance related stress and helps you build the lifelong skills you need to not only manage, but really make the best of your unique financial picture.

With more than 25 years serving as financial advisors to individual clients, families, companies, and nonprofit organizations across the country, CAPTRUST has the experience and expertise to help. We're here to assist every employee in reaching their desired financial goals.