Introducing CAPTRUST Financial Advisors

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

If you are like most people, you may struggle with feeling confident about making financial decisions. William & Mary believes in helping you make the most of your compensation and benefits package. To help you build a solid financial future, we have hired CAPTRUST as a resource to help you with these important decisions. Improving your financial wellness is one of William & Mary's top concerns.

Who are they? CAPTRUST is an independent investment advisory firm that currently provides investment advice to William & Mary's retirement plan committee and plan participants. Employees who need help navigating their retirement benefits and other financial priorities (e.g. budgeting, debt, credit, college savings) can rely on CAPTRUST's participant advice program. CAPTRUST has been helping individual participants like you for over 25 years, by providing personalized advice. 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 access to professional, unbiased advice. CAPTRUST will not sell you any products – their services are made available to you as part of William & Mary's retirement plan benefits package. When you meet with CAPTRUST, the first step is to work with them to create a Retirement Blueprint™, a comprehensive planning tool tailored to your individual needs. A Retirement Counselor will guide you through the decision-making process and provide you with individual advice such as to how much you need to save, how to invest your retirement assets and how to integrate your information alongside your spouse's accounts and /or other investments.

How do I make an investment advice appointment with CAPTRUST? The easiest way to make an investment advice phone appointment is to schedule it online at www.captrustadvice.com. You can also call CAPTRUST directly at 800.967.9948.

What about advice we currently get from TIAA and Fidelity? CAPTRUST is expanding their work with us and will now help us coordinate advice, information, and training sessions between the three organizations. In the near future, you will hear more about how CAPTRUST will help us tailor the retirement information we receive from TIAA, Fidelity, and CAPTRUST so that it is specific to each of us as individuals and to where we are in our career. More information to come.

Upcoming Events: CPATRUST will be hosting two webinars in the month of October. The first webinar will be an overview of all the services CAPTRUST can offer you, the webinar will be on October 21st at 11:00 AM. The second webinar will be an overview of your retirement benefits and how Captrust can help you navigate the process, this webinar will be on October 28th at 2:00 PM. Please be on the lookout for the invitation to the webinars.

Thank you,
Human Resources