



CAPTRUST

HERE TO HELP YOU

EXPERT ADVICE ON YOUR RETIREMENT PLANNING NEEDS

CAPTRUST Financial Advisors, the independent financial advisory firm that works on **Wake Forest University Retirement Plan**, will be onsite conducting individual meetings as follows:

Date	Location	Meeting Room
Throughout 2024	2120 Eure Dr. Winston-Salem, NC - Benson University Center	Room 343 & Room 406
Throughout 2024	Virtual	

Topics covered in the forty-five-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 individual or virtual session](#)

How Do I Schedule an Appointment?

1. Choose Onsite or Virtual Meeting.
2. Click "Wake Forest University 1:1's" and then click continue at the bottom
3. Choose the 45-minute session you wish to attend.
4. Enter your information and click **Schedule It**. A confirmation email will then be sent immediately.
5. A reminder email will also be sent 24 hours in advance of the meeting.
6. 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.
7. For virtual consultations, CAPTRUST will call you at the number provided at the time of your appointment and does have video/screensharing capabilities, if desired.
8. 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 Advice Desk is also available. Appointments can be made with the Advice Desk by visiting www.captrustadvice.com.