



CAPTRUST Financial Advisors, the independent advisory firm that works on the UNC Retirement Programs, will be conducting phone consultations on **May 29<sup>th</sup> & 30<sup>th</sup>, June 25<sup>th</sup> & 27<sup>th</sup> and July 16<sup>th</sup> & 18<sup>th</sup>**. If desired, there are video/screensharing capabilities available at the time of your appointment.

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 CAPTRUST and the Participant Advisory Service, you can view a short and informative video here: [Investment and Retirement Plan Advice Made Easy \(captrustadvice.com\)](https://www.captrustadvice.com).

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?

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1. Click on "UNC System – Phone Consultations" and click continue.
2. Choose the 45-minute session you wish to attend.
3. Enter your information and click **Schedule It**. A confirmation email will then be sent immediately.
4. A reminder email will also be sent 24 hours in advance of the meeting.
5. 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.
6. CAPTRUST will call you at the number provided at the time of your appointment and does have video/screensharing capabilities, if desired.
7. If you have any questions or need assistance, please call CAPTRUST at 800.967.9948.

To be best 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 attend one of these sessions, 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](https://www.captrustadvice.com).