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

Your Retirement Blueprint ®

If you're watching this video, then your company has given you the opportunity to receive personalized investment advice using CAPTRUST. One of the benefits you now have access to is working one-on-one with a calf Trusts advisor to create a retirement blueprint. This is a tool to measure your progress towards your retirement savings goals, as well as offer advice on how to invest your retirement accounts.

Your blueprint will help you answer questions that pertain to your personal financial situation, such as, how much should I be saving? What is the recommended investment strategy for me? When can I retire, and will I have enough money to last me for 20 to 30 years? Most of what you need to create a financial blueprint you already know or can access easily. The key data points needed are your age, saving habits, risk tolerance, information about you and your spouse or partner's current retirement savings, and how much income you might need during retirement to cover your living expenses.

During your appointment, CAPTRUST will help you identify and locate all of the information needed to complete the blueprint, and we can create multiple blueprints based on different scenarios in case you are unclear about when you plan to retire. You are also welcome to have your spouse or partner participate in the meeting. Your blueprint is a personalized report that will reflect the information you provide as well as projections for your future financial goals. The report will serve as a financial tool that you can build on over time.

Once you complete your first blueprint, you will receive a secure email instructing you how to set up an account and access your blueprint within our Okta system. You'll have 30 days to activate your account. Unlike other online tools, the blueprint is a document delivered to you that can be downloaded and printed for easy reference. It is important for you to be prepared for your meeting with CAPTRUST by having your last retirement account statement, as well as any other outside investments or portfolio holdings.

Please also have your username and password for your retirement account handy so that you can implement recommendations to your account in real time. You will get immediate virtual access to your blueprint once the appointment is completed. To make an appointment, visit captrustadvice.com. We look forward to helping you develop your blueprint and gain confidence in your financial future.