DARE TO SOAR

Human Resources

We are pleased to announce that CAPTRUST Financial Advisors, the independent advisor that works with the UNC retirement program, will be onsite October 27th-30th conducting both group and individual consultations. The one hour **group sessions will be held in the Madeline Suite in Wagoner Hall** and will discuss the recent changes to the Optional Retirement Program.

The schedule is as follows:
October 27th- 9 am
October 28th- 12:30 pm
October 29th- 2 pm
October 30th- 9:30 am

In addition to the group sessions, CAPTRUST will conduct individual consultations. Topics covered in the half-hour individual sessions include, but are not limited to the following:

- Understanding the changes to your plan and how they affect your retirement goals
- Retirement Planning and Investment Strategy
- General Financial Planning
- Assist you with choosing a new retirement provider
- Determine if you are on track to achieve your retirement goals

These one-on-one sessions are offered to you solely as a benefit; CAPTRUST's role is not to sell you anything, but purely to help you make sound investment decisions. You can schedule an appointment for the individual sessions with a professional CAPTRUST Financial Advisor by following these simple steps:

Click here to schedule now

- Choose the location
- Choose an available 30 minute session
- Enter your information and click “Schedule It”
- A confirmation email will then be sent immediately
- A reminder email will also be sent 24 hours in advance of the meeting
- 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.
- If you have any questions or need assistance, please call CAPTRUST at 800.967.9948. Phone consultations can also be arranged at this number.

If you are currently with TIAA-CREF or Fidelity, please bring your USERNAME and PASSWORD for your provider's retirement website. Feel free to bring any outside financial statements or information relevant to your investment portfolio for additional advice or further review.

TIAA-CREF and Fidelity will also be in attendance during the group meetings as additional resources for your help. They also will have individual appointments available, which you can sign up for here:
www.fidelity.com/reserve

www.tiaa-cref.org/schedulenow

Please contact Kelly Kennedy (x23006) kennedyk@uncw.edu or Diana Waser (x23345) waserd@uncw.edu if you have any questions.