



CAPTRUST

HERE TO HELP YOU

EXPERT ADVICE ON YOUR FINANCIAL PLANNING NEEDS

CAPTRUST Financial Advisors, the independent financial advisory firm that works on The University of Scranton Retirement Plans, will be onsite conducting individual meetings as follows:

- Dates: October 24th, 25th, 26th and November 7th, 8th, 9th
- Address: 800 Linden St, Scranton, PA
- Location: St. Thomas Hall, Office of Human Resources, Suite 100

Topics covered in the forty-five-minute individual advisory sessions include, but are not limited to the following:

- 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 appointment](#)

How Do I Schedule an Appointment?

1. Click "University of Scranton 1:1's – HR Office" and then click continue at the bottom.
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. 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 current retirement account balances and contributions to the accounts. You will also want to bring login information and/or current balances of your investments.

If you cannot make a live session, but want or need further advice, the CAPTRUST Advice Desk is also available. Appointments can be made with the Advice Desk by visiting www.captrustadvice.com.