HERE TO HELP YOU

EXPERT ADVICE ON YOUR RETIREMENT PLANNING NEEDS

CAPTRUST Financial Advisors, the independent financial advisory firm that works on the **Baylor Retirement Plans,** will be onsite conducting individual meetings as follows:

- Dates: July 13th & 14th
  August 17th & 18th
  September 14th & 15th
  October 19th & 20th
  November 16th & 17th
  December 14th & 15th
- Address: 101 Bagby Ave Waco, TX or
- Location: Science Building – Please see link for room

- Dates: October 12th
  November 2nd
- Address: Louise Herrington School - 333 N. Washington Ave, Dallas, TX
- Location: Room 404

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 appointment

How Do I Schedule an Appointment?

1. Click "Baylor University 1:1's – Waco, TX" and then click continue at the bottom.
2. Choose the 45-minute session you wish to attend and click continue on the bottom right.
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 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 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.