

UNDERSTANDING THE DIFFERENCES: CAPTRUST AT WORK & YOUR RECORDKEEPER

CAPTRUST
— AT WORK —

Understanding the roles of your recordkeeper and CAPTRUST at Work helps you maximize financial wellness. Use the guide below to distinguish their services and make informed financial decisions.

CAPTRUST at Work

- Budgeting
- Debt management
- Emergency savings
- Enrollment counseling
- Estate planning
- Financial planning
- Investment advice
- Retirement planning
- Loan and distribution details

Transamerica

- Account management
- Beneficiary and personal information updates
- Investment changes
- Paycheck deferral adjustments
- Plan enrollment
- Plan highlights, personal performance, and statements
- Transactions (loans, distributions, etc.)

CONTACT US TODAY!

 captrustatwork.com/scheduler

 800.967.9948