

INTRODUCING CAPTRUST AT WORK

CAPTRUST
— AT WORK —

Texas State University is committed to helping you make the most of your benefits package and build a strong financial future. To support you, we've partnered with CAPTRUST at Work, a trusted advisor to the **Texas State University System** retirement plans, to provide financial guidance tailored to your needs. CAPTRUST's experienced financial professionals understand our benefits and can help you make informed financial decisions to improve your overall well-being.

What is CAPTRUST at Work?

CAPTRUST at Work is a financial wellness and advice program designed to provide you with objective, fiduciary financial advice and education. Their experienced financial professionals can help you create a personalized financial roadmap to support your long-term goals. Here are some of the ways CAPTRUST can help:

- Retirement Planning – Support with enrollment, investment choices, and Roth vs. pretax contributions.
- Financial Planning – Budgeting, debt management, and planning for major life events.
- Investment Strategies – Optimizing allocations, managing loans, and aligning savings with long-term goals.

What services are available?

As a part of your benefits package, you have complimentary access to the following services:

- [CAPTRUSTatWork.com](https://www.captrustatwork.com): Watch recorded presentations, use financial calculators, and schedule appointments for personalized advice.
- [Automated Resources](#): Expand your financial knowledge with webinars, articles, videos, and tailored educational campaigns.
- [Financial Technology](#): Develop a comprehensive financial plan with CAPTRUST's cutting-edge technology tools.
- [One-on-One Consultations](#): Meet with a financial counselor to discuss your unique financial situation and get personalized advice.

How do I schedule an appointment?

The easiest way to schedule an appointment is online at [CAPTRUSTatWork.com](https://www.captrustatwork.com) or by calling (800) 967-9948.

We're excited to offer CAPTRUST at Work as a resource for you and look forward to sharing more tools and insights to help make the most of your financial benefits. Stay tuned for more updates!