

# 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

### Corebridge, Fidelity, TIAA, VOYA *(your recordkeepers)*

- Account management
- Beneficiary and personal information updates
- Investment changes
- Paycheck deferral adjustments
- Plan enrollment
- Plan highlights, personal performance, and statements

**CONTACT US TODAY!**

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