



At CAPTRUST, we believe an investment advisory firm is only as strong as the people who create the advice.

CAPTRUST + University System of Georgia
CAPTRUST Financial Coaching and Retirement Planning Advice

CAPTRUST Financial Advisors has been advising institutional clients and their employees for more than 30 years. As consultant to the University System of Georgia's retirement plans and advisor to plan participants, CAPTRUST is available to advise employees who are evaluating their retirement saving and investing options.

At the end of the day, our question is this, what's your plan? We're available to help you address that question, proactively look to the future, and prepare for the unexpected.

Questions you may have for CAPTRUST include:

- Understanding my USG Retirement plan as a new or existing employee (ORP or TRS).
- Should I enroll in a voluntary plan? Which one is right for me?
- Am I on track to retire?
- Is my investment strategy right for me?
- Should I have Roth or pre-tax assets?
- Am I saving enough? How can I manage my personal finances and debts to save more?



Brandon Aber
Financial Advisor



Shaletia Patton
Financial Advisor

Looking for help?

As an employee of the University System of Georgia, you have access to independent, fiduciary advice through CAPTRUST. We have a dedicated team of advisors and counselors to help you with retirement planning, budgeting and debt management, investment strategies, and much more.

We are available during pre-determined virtual and on-site days. You can also reach a counselor by scheduling an appointment online at captrustadvice.com or calling the CAPTRUST Advice Desk at 800.967.9948.

We are here to provide you with access to professional, unbiased investment advice. We will not sell you any products – our services are made available to you as part of the USG retirement plan benefits package.