

CAPTRUST AT WORK Q1 2025 PARTICIPANT COMMUNICATIONS

CAPTRUST
— AT WORK —

SAVE

- **January 22**

Ask CAPTRUST: Saving on a Tight Budget

- Invitations sent 1.8 and 1.15

- **January 23**

Participant email newsletter with Market Update video, topical articles, and webinar recording

- **February 19**

Webinar: Creative Ways to Reduce Expenses

- Invitations sent 2.5 and 2.12

- **February 20**

Participant email newsletter with LIFE video (Saving to Buy a Home), topical articles, and webinar recording

- **March 20**

Participant email newsletter with video (Common Savings Mistakes) and topical articles



PLEASE NOTE: DATES AND TOPICS ARE SUBJECT TO CHANGE

CAPTRUST AT WORK Q2 2025

PARTICIPANT COMMUNICATIONS

CAPTRUST
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INVEST



- **April 17**
Participant email newsletter with Market Update video and topical articles
- **May 21**
Webinar: The Power of Dollar Cost Averaging
 - Invitations sent 5.7 and 5.14
- **May 22**
Participant email newsletter with LIFE video (Investing in Your 30's and 40's), topical articles, and webinar recording
- **June 19**
Participant email newsletter with video (What Are Bonds?) and topical articles

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CAPTRUST AT WORK Q3 2025 PARTICIPANT COMMUNICATIONS

CAPTRUST
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RETIRE

- **July 16**

Ask CAPTRUST Webinar: Outliving Your Annuities

- Invitations sent 7.2 and 7.9

- **July 17**

Participant email newsletter with Market Update video, topical articles, and webinar recording

- **August 20**

Webinar: Should You Consider Partial Retirement?

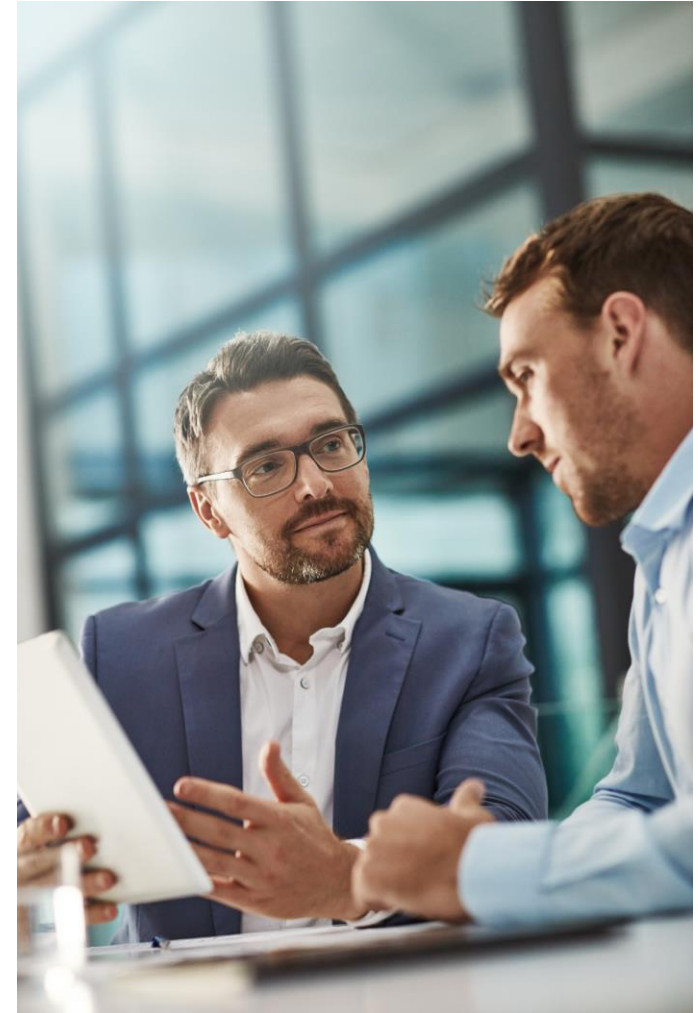
- Invitations sent 8.6 and 8.13

- **August 21**

Participant email newsletter LIFE video (Purpose in Retirement), topical articles, and webinar recording

- **September 18**

Participant email newsletter with video (Downsizing for Retirement) and topical articles



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CAPTRUST AT WORK Q4 2025 PARTICIPANT COMMUNICATIONS

CAPTRUST
— AT WORK —

PLAN



- **October 16**
Participant email newsletter with Market Update video and topical articles
- **November 19**
Webinar: Financial Planning for Caregivers
 - Invitations sent 11.5 and 11.12
- **November 20**
Participant email newsletter with LIFE video (3 Steps to Create an Emergency Fund), topical articles, and webinar recording
- **December 18**
Participant email newsletter with video (Protecting Your Financial Identity) and topical articles

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