Partnership Brings New Resource for Retirement Advice and More

The Arizona Board of Regents and the Arizona University System have partnered with CAPTRUST, a retirement advisory firm and financial fiduciary, to help University of Arizona employees achieve their financial goals, whether that’s preparing for retirement, creating a budget, managing debt, saving for college or buying a house. The collaboration is expected to provide the employees with comprehensive financial guidance and support, enabling them to make informed financial decisions and achieve their long-term financial goals.

“CAPTRUST offers personalized and unbiased financial advice,” said Josephine Corder, director of Life & Work Connections. They do not sell any products or services and are free for employees.

Employees can access one-on-one consultations, educational webinars and tools to create a personalized Retirement Blueprint. The Retirement Blueprint is a comprehensive report considering every aspect of an employee's financial state. Based on the information provided by the employee, it helps provide projections on how they can meet their financial goals.

The Retirement Blueprint can answer some of the most common questions that employees have, such as how much they should be saving, what is the recommended investment strategy for them and when they can retire. Employees can create multiple blueprints based on different scenarios.

Corder compared the Retirement Blueprint to an annual wellness exam but for finances. "You can go to CAPTRUST to review your finances annually and at major milestones, so your financial future is always in focus," Corder said.

To learn more, visit the CAPTRUST website [1].

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