



**Helping meet
your employees'
financial future
with confidence**



HOW DO WE PROVIDE VALUE TO YOU AS AN HR PROFESSIONAL?

PRESENTATION TOPICS

- Social Security
- Pension Options
- Medicare
- Estate Planning
- Women and Retirement
- Financial Crisis Series
- Optimizing your Benefits
- College Savings Strategies
- 5 Years from Retirement
- Maximizing HSA Plans
- Beyond the Numbers - Mentally Preparing for Retirement

OTHER EDUCATION WE PROVIDE

- Financial Podcast
- Quarterly Market Webinars
- Semi-Annual Bootcamp Events
- Consultations

COMMONLY ASKED QUESTIONS

- When should I file for Social Security?
- Will Social Security be there for me?
- Can I have an HSA and be on Medicare?
- Am I on track to retire?
- Which pension decisions are best for me?
- How do I reduce my tax bill?

CAPITA FINANCIAL PRESENTATIONS AND RESOURCES

Capita provides education to many large employers in and around Utah. By providing educational resources, complimentary consultations, and presentations to employee groups, we focus on building long-lasting relationships through comprehensive planning. We work collectively to serve our clients' goals.

We Provide for Your Employees:

- Individualized Reports
- Pension Analysis
- Tax Analysis
- Risk Analysis
- Educational Resources



SCAN FOR INFO



CONTACT OUR TEAM

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