



**Date:** April 15, 2015  
**To:** UNC Retirement Program Participants  
**From:** **Brian Usischon**  
Associate Vice President for Human Resources &  
University Benefits Officer  
**Subject:** First Quarter Retirement Statements Arriving Soon

Last year, we informed you that Lincoln Financial Group and VALIC would no longer be investment carriers in the UNC Optional Retirement Plan (ORP). As a result, if you were investing with Lincoln Financial Group or VALIC and you did not elect a new carrier for your ORP contributions, your existing account and future investments were transferred to the appropriate age-based Vanguard Target Date Fund with TIAA-CREF earlier this year.

## Review Your Quarterly Statement

When you receive your first quarter statement for 2015, please carefully review your account information to ensure that the changes were applied correctly to your ORP. If you currently receive your statement in the mail, you should receive it by mid-April. If you elected to receive your statement online, you should visit your carrier's website to review your current statement.

To assist you with understanding your account and any recent changes, UNC has partnered with CAPTRUST, the University's investment advisor. CAPTRUST can assist you with choosing investments, discuss changes to the plan and answer any other questions you may have concerning your retirement planning. You can schedule an appointment with a counselor online at [www.captrustadvice.com](http://www.captrustadvice.com) or speak with a financial advisor by calling **800-967-9948**, Monday through Thursday, 8:30 a.m. – 5:30 p.m., ET and Friday, 8:30 a.m. – 4:30 p.m., ET.

## Questions?

If you have questions about any of the UNC Retirement Programs, please contact your campus HR/Benefits representative.