

Get to know your retirement plan options



Help build savings for a more secure future with the Cone Health retirement plans

See how the Cone Health System 403(b) Voluntary Savings Plan and the 401(a) Retirement Plan can help you prepare for what's ahead.

403(b) plan	401(a) plan
<ul style="list-style-type: none"> • Immediate eligibility upon hire and automatic enrollment at a 4% contribution rate from your pretax pay • Additional automatic contribution increases of 1% each year up to 15% • Ability to change your contributions and investments at any time • Cone Health match of 50% up to 8% of eligible compensation once you've worked 12 months and 1,000 hours (on quarterly entry dates: 1/1, 4/1, 7/1, 10/1) • 100% vesting of matching contributions after three years of service (1,000 hours each year) • Opportunity to make Roth (post-tax) contributions by enrolling in a Roth 403(b) account • Rollovers from qualified plans or IRAs are accepted 	<ul style="list-style-type: none"> • Eligible for employer contributions after 12 months and 1,000 hours of service • Up to 2% potential contributions annually based on the financial performance of the health system • Employer-only contributions to your account (no personal contributions) • Must be employed on the last business day of the plan year (12/31) to receive a contribution • 100% vesting of contributions after three years of service (1,000 hours each year) • You decide how to invest the contributions among the available investments in the plan



INVESTMENT OPTIONS

The Cone Health retirement plans allow you to be as hands-off or hands-on as you'd like when choosing your investments. You can select your own mix of investments from the mutual funds available in the plans or choose a target date portfolio option. A target date portfolio automatically maintains a blend of investments based on a projected retirement year and adjusts your portfolio to become more conservative as you move closer to retirement.

Create a saving strategy with help from a Corebridge financial professional. Turn the page to meet your team!

Schedule a financial consultation

Corebridge Financial's team of dedicated financial professionals can help you pursue your financial goals and prepare for a more secure retirement. You can meet with them in-person or virtually.



David Dupont
Senior Financial Advisor
Cell: 336.335.9872
Office: 336.832.7995
david.dupont@
corebridgefinancial.com



Kevin Hanner
Financial Advisor
Cell: 336.707.9551
Office: 336.832.0090
kevin.hanner@
corebridgefinancial.com



Cynthia Reavis
Financial Advisor
Cell: 336.951.7030
Office: 336.538.7667
cynthia.reavis@
corebridgefinancial.com



TAKE ACTION FOR YOUR FUTURE

Register for online account access and learn more about your plans at conehealth.corebridgefinancial.com or scan the code with your mobile phone.

This material is general in nature, was developed for educational use only, and is not intended to provide financial, legal, fiduciary, accounting or tax advice, nor is it intended to make any recommendations. Applicable laws and regulations are complex and subject to change. Please consult with your financial professional regarding your situation. For legal, accounting or tax advice, consult the appropriate professional.

The principal value of an investment in a target date fund is not guaranteed at any time including at or after the target maturity date. The target date is the approximate date when investors plan to start withdrawing their money. The fund will gradually shift its emphasis from more aggressive investments to more conservative ones based on its target date.

Investors should carefully consider the investment objectives, risks, fees, charges and expenses before investing. Read the fund prospectuses carefully before investing. The fund prospectuses contain important information, which can be obtained from your financial professional at conehealth.corebridgefinancial.com or by calling 1.800.428.2542 and following the prompts.

Annuities are issued by **The Variable Annuity Life Insurance Company**, Houston, TX. Variable annuities are distributed by AIG Capital Services, Inc., member FINRA.

Securities and investment advisory services offered through VALIC Financial Advisors, Inc., member FINRA, SIPC and an SEC-registered investment adviser.

VALIC Retirement Services Company provides retirement plan recordkeeping and related services and is the transfer agent for certain affiliated variable investment options.

All companies above are wholly owned subsidiaries of Corebridge Financial, Inc.

Corebridge Retirement Services, Corebridge Financial and Corebridge are marketing names used by these companies.

© Corebridge Financial, Inc. All rights reserved.

VC 39765 (05/2023) J1139202 EE