



Wespath

BENEFITS | INVESTMENTS



EY Financial
Planning Services

a general agency of The United Methodist Church



PROFESSIONAL
ASSISTANCE FOR YOUR
FINANCIAL PLANNING
AT NO ADDITIONAL
COST.* NO MATTER HOW
MUCH HELP
YOU NEED.

When you invest toward retirement with Wespath, you enjoy the added-value benefit of confidential, professional help from EY at no additional cost.*

Your Retirement, Your Values

The easy way to be in charge of your retirement is by investing your retirement savings with Wespath. You can save for retirement through our diversified investment options, with reasonable investment expenses that do not include commissions. The investment options adhere to the Church's *Social Principles*, so you won't have to compromise your values.

We share your values and respond to your needs. That's why we offer benefits such as EY Financial Planning Services. Starting the retirement planning and management process can cause you to ask yourself:

"How much do I need to save to reach my retirement goals?"

"How can I afford to save while making a major purchase like a home or vehicle?"

"When can I adjust my contribution amounts?"

"How can I manage my debts and expenses so that I can save for retirement?"

Now you have help to answer those and other questions. You can evaluate your situation with a specially trained professional from EY, an added benefit for investing with Wespath.

CONFIDENTIAL, UNBIASED GUIDANCE AT NO ADDITIONAL COST

Financial Matters Matter

EY, a leading global financial services firm, offers objective guidance from qualified financial professionals. You can get assistance with a wide range of issues, including:

- *Starting an effective retirement plan*
- *Choosing your asset allocation*
- *Purchasing a home*
- *Purchasing life insurance*
- *Managing credit card and other debt*
- *Estate planning*
- *Determining how much to save*
- *Paying for children's education*
- *Financing a college education*
- *Understanding tax issues*
- *Buying a car*

Additionally, EY representatives have been specially trained in topics important to our participants:

- *Wespath-administered plans and programs*
- *Clergy housing allowance*

WHO IS ELIGIBLE?

EY Financial Planning Services are made available by Wespath to:

- *Active participants with an account balance*
- *Surviving spouses with an account balance*
- *Terminated and retired participants with an account balance of at least \$10,000*

HOW DOES IT WORK?

Guidance from financial planners who understand your needs

Whether you just have a specific question or your concern requires an in-depth discussion, your financial planner can provide the personalized guidance you need to develop an action plan. If you don't know where to start, EY professionals are skilled interviewers who can put you on the right track.

Unlimited phone time

You can call an EY representative as often as you like, and spend as much time on the phone as you need.

Topic-specific reports for particular goals

Your financial planner will create customized reports on a wide variety of personal financial topics and walk you through the findings.

ADDITIONAL SERVICES

EY Website

Get tips on managing your money and expand your knowledge of financial topics on the EY Navigate website at wespath.eynavigate.com. The website offers:

- *Financial planning articles*
- *Webinars*
- *Calculators on a wide range of topics*

Guidance About LifeStage

Contact EY for guidance about whether LifeStage Investment Management is appropriate for your defined contribution account. This service—another benefit provided at no additional cost*—automatically invests your accounts in Wespath's investment funds.

EY can also provide guidance in determining whether using LifeStage Retirement Income to manage your monthly retirement income from your defined contribution account is appropriate for you.



NO FORMS. NO ENROLLMENT.

EY financial planners DO NOT SELL investment or insurance products. This means you receive unbiased guidance without any of the sales pressure you'd experience from many other financial planners.

Getting started is as easy as making a call to EY at **1-800-360-2539**. An EY representative will start providing guidance immediately. It's that easy!

Or schedule an appointment at **wespath.eynavigate.com**.

You will need your Participant number from Wespath when you call EY or register on their website. To find your participant number on the Benefits Access website at **benefitsaccess.org**, on the Retirement tab, select "**Profile**," then "**Account Management Summary**."

HOW DO I GET STARTED?

Depending on your question, EY may need some information. They can take it over the phone, or you can provide it by fax, e-mail or upload it to the EY website. You may also want to provide them your account information through Benefits Access.

Visit **benefitsaccess.org**—on the Retirement tab, select "**Profile**," "**Account Management Summary**," then:

- 1 Go to **EY Authorization** section.
- 2 Click on green button to turn on authorization. (They can view your account information, but they can't submit transactions. PLUS, you can change this preference at any time.)



EY Financial Planning Services

1-800-360-2539

Business days from 8:00 a.m. - 7:00 p.m., Central
time.

OR VISIT **WESPATH.EYNAVIGATE.COM**



Wespath
BENEFITS | INVESTMENTS

1901 Chestnut Avenue • Glenview, IL 60025-1604 • [wespath.org](https://www.wespath.org)

© 2024 Wespath Benefits and Investments