



# Tools for Taking Control of Your Financial Well-Being

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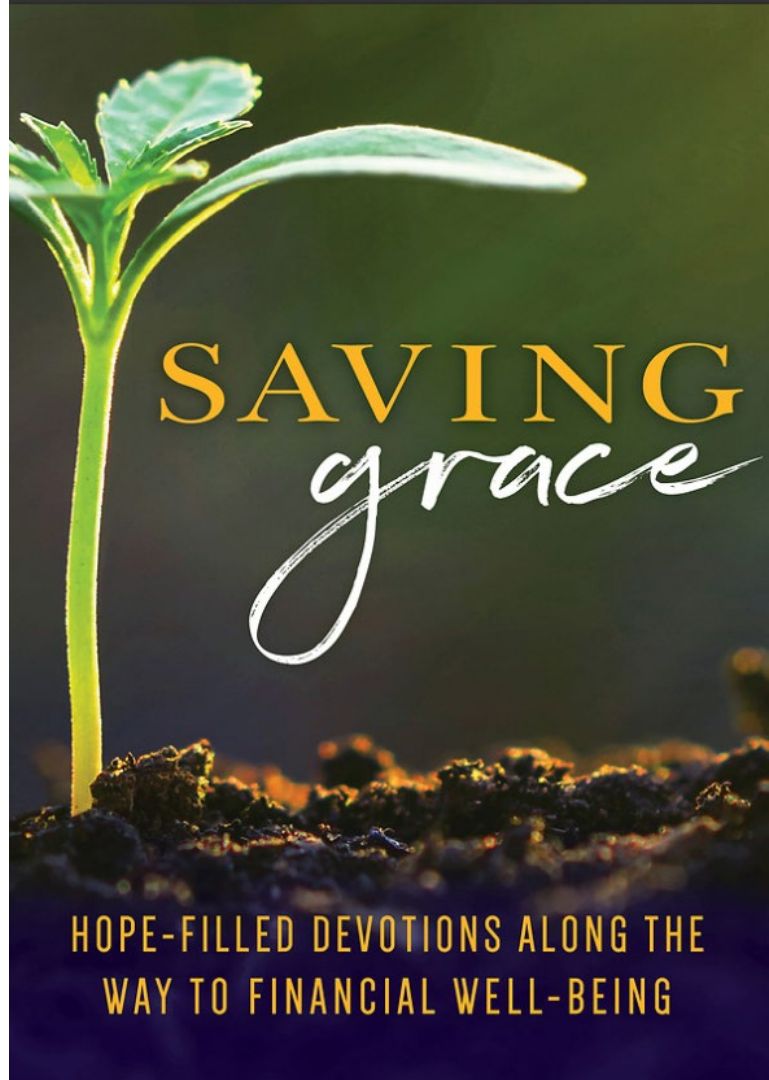
## Question to Answer in the Chat

Which area of personal finance do you feel most motivated to improve right now? (e.g., budgeting, saving, debt management, giving, building an emergency fund, etc.)

# Saving Grace

A Guide to Financial  
Well-Being

**Wespath**



# SAVING *grace*

HOPE-FILLED DEVOTIONS ALONG THE  
WAY TO FINANCIAL WELL-BEING



# A Wesleyan Perspective on Money Management

## ***Saving Grace*** promotes:

- Healthy relationship with money
- Financial principles and strategies for a sustainable financial life
  - Saving
  - Earning
  - Giving
  - Spending
  - Debt management

# Saving Grace: What's Included

- Participant workbook
  - Six sessions
  - Worksheets
- Videos available to stream
- Leader guide
- Clergy editions
  - Workbook
  - Videos
- Devotional guide



# Clergy Debt Refinancing Programs

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# Clergy Debt Refinancing Programs

By refinancing, clergy can access much lower interest rates:

**6%**

OR LOWER

CONSUMER  
(CREDIT CARD) DEBT

**2.5%**

OR LOWER

STUDENT  
LOAN DEBT

**Refinancing has many  
benefits for clergy:**

- Lower monthly debt payments
- Makes debt more manageable over long term
- Helps improve credit scores with regular payments

# Institutions Offering Clergy Debt Refinancing

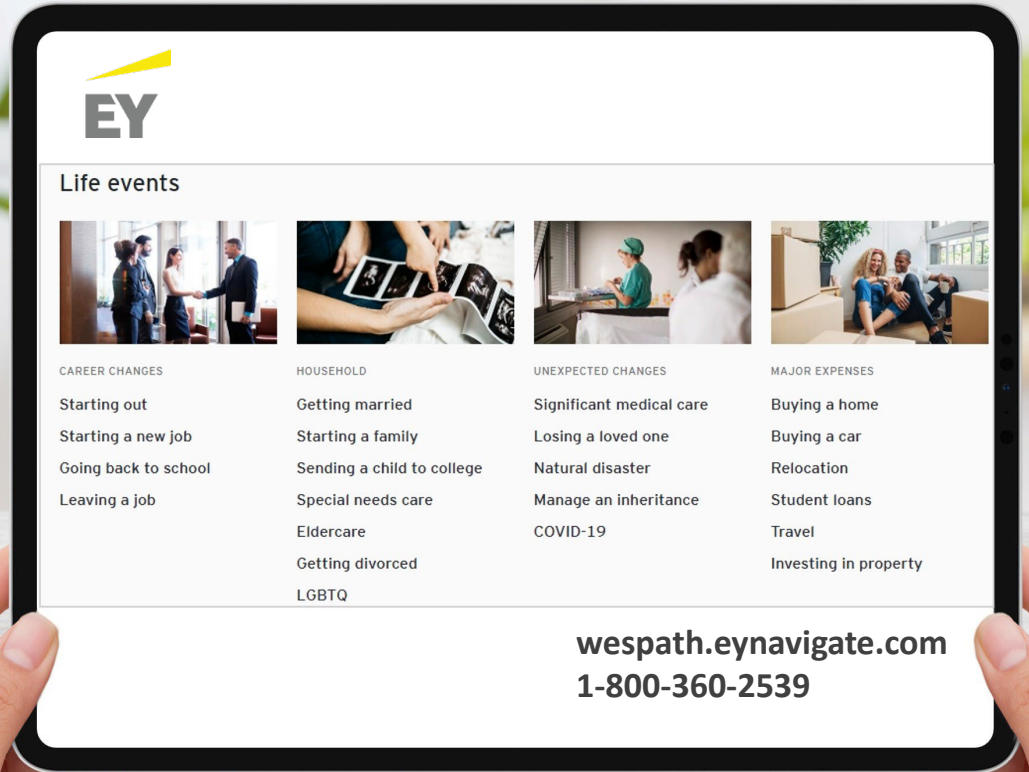
<b>United Methodist Foundation</b>	<b>Annual Conference Served</b>
Iowa UMF	Iowa
Western North Carolina UMF	Western North Carolina
New England Preachers Aid Society	New England
The UMF, Inc. North Carolina	North Carolina
Florida UMF	Florida
Michigan UMF	Michigan
<b>Credit Union</b>	<b>Annual Conferences Served</b>
Interfaith CU	Entire Western Jurisdiction; New England, MO, MN, Dakotas, Holston, TN-Western KY, Northern IL, Iowa
United Methodist CU	VA, WV, Baltimore-Washington, NC, Western NC
Christian Family CU	East Ohio, West Ohio, Indiana, Western PA

# EY Financial Planning Services






[wspath.eynavigate.com](https://wspath.eynavigate.com)  
1-800-360-2539

# EY Can Help with More Than Retirement



**EY**

## Life events

			
<b>CAREER CHANGES</b>	<b>HOUSEHOLD</b>	<b>UNEXPECTED CHANGES</b>	<b>MAJOR EXPENSES</b>
Starting out	Getting married	Significant medical care	Buying a home
Starting a new job	Starting a family	Losing a loved one	Buying a car
Going back to school	Sending a child to college	Natural disaster	Relocation
Leaving a job	Special needs care	Manage an inheritance	Student loans
	Eldercare	COVID-19	Travel
	Getting divorced		Investing in property
	LGBTQ		

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# EY Can Help with More Than Retirement

## Topics



### SET FOUNDATION

Cash flow & budgeting  
Debt management  
Emergency funding  
Tax



### MANAGE RISK

Life insurance  
Disability insurance  
Health insurance  
Other insurance  
Estate planning



### PLAN FOR THE FUTURE

Retirement planning  
Investing  
Education funding  
Distribution planning



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