

# Wespath Services for Financial and Retirement Planning

Wespath offers easy to access financial and retirement planning services to help you plan for retirement and improve your financial well-being. Each has its own unique offering that can benefit you throughout the year and your lifetime. Used in combination, these resources can help you build and maintain a strong plan for you and your family's financial future.

## EY Financial Planning Services

### WHAT:

EY offers financial planning services to eligible Wespath participants at no additional cost\*. Talk with a financial planner, access financial planning tools and resources and attend educational webinars.

### WHO:

Eligible Wespath participants and surviving spouses

### HOW:

Contact EY at **1-800-360-2539** or visit [wespath.eynavigate.com](http://wespath.eynavigate.com).



## Wespath Benefits Education Team

### WHAT:

A team of experienced professionals to assist you with understanding your Wespath benefit plans and retirement decisions. This team offers private 30-minute one-on-one consultations to discuss your options and Wespath benefit plans and services.

### WHO:

Active Wespath participants who have recently attended an on-site or virtual event

### HOW:

One-on-one consultations are available in conjunction with Annual Conference and Wespath sponsored events.



## Wespath Customer Service

### WHAT:

A team to assist with questions related to retirement, loans, distributions, health and well-being, eligibility, contribution election changes and more.

### WHO:

All Wespath participants, surviving spouses and beneficiaries

### HOW:

Call **1-800-851-2202**. Representatives are available business days from 8:00 a.m. to 6:00 p.m., Central time.



## Saving Grace: A Guide to Financial Well-Being

### WHAT:

A personal money management program that helps you integrate your United Methodist faith into your finances.

### WHO:

Clergy, congregations and the broader community

### HOW:

The program is intended to be done in a group, akin to a Bible study. Workbooks and more can be purchased at [abingdonpress.com/savinggrace](http://abingdonpress.com/savinggrace).



\* EY Financial Planning Services are available to active Wespath participants and surviving spouses with account balances, and to retired and terminated participants with account balances of at least \$10,000. Costs are included in Wespath's operating expenses that are paid for by the funds.