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.**

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.

Scan the QR code to schedule a consultation with a Wespath Benefits Educator.

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 **1-800-851-2201**. 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.**

* 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.

Wespath
BENEFITS | INVESTMENTS

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