

Quadrennial  
Benefits  
Conference



PAVING THE WAY TOGETHER

# Spotlighting EY Financial Planning Services



**Wespath**  
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# Agenda

- Why Does Wespath Offer EY Financial Planning Services?
- What Does EY Do for Participants?
- How Many Participants Use EY?
- What Opportunities Exist?

# Why EY?



- EY provides objective, personalized advice and guidance via highly trained planners
- EY supports other denominations and provides assistance with clergy-specific issues

# Why EY?



## EY's Services

- Encourage behaviors that are more likely to result in retirement readiness
- Provide a comprehensive resource to promote overall financial wellness

# Why EY?



Participants who have used EY's services  
are projected to be more ready to retire  
than those who have not!

# What Does EY Do?

- EY's services complement Wespath's education efforts
  - Phone consultations
  - Web-based tools and webinars
  - In-person workshops/consultations
- Participants may request assistance with specific issues, *or* request and receive comprehensive financial plans
- EY's services are available to approximately 62,000 participants
  - All active status
  - Terminated status (and beneficiaries) if \$10,000+ on account

# What Does EY Do?



- DC contribution and investment allocation
- Estate and insurance planning
- Home purchase planning
- Cash flow and debt management
- Education cost planning
- Tax diversification planning

**All at NO COST to participants!**

Costs are paid through the operating expenses of the underlying investment funds.

# How Many People Use EY?

## 2015 Utilization

**8.48%** contacted EY by phone  
**30%** increase over 2014

**4.53%** visited EY website  
**36%** increase over 2014

**2.23%** received a comprehensive financial analysis  
**9%** increase over 2014



# How Many People Use EY?

EY's recent website enhancements have increased website traffic in 2Q 2016 by **550%**

- Simple registration required for information security
- Financial Wellness Assessment
- Easier-to-use topical questionnaires
- Personalized action plans



# Do Participants Value EY Services?



- Wespeth's participant survey results
- EY's satisfaction scores
- Anecdotal feedback

# How Do We Promote EY?



## Wespath promotes EY through:

- Print communications
- Website
- Organized events
- Customer Service Call Center

# Breakout Discussion

1. How does your conference promote EY?
2. What feedback have you heard about EY's services?
3. What else can we do to promote EY?





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