Welcome to the EY financial planning experience. Your financial planning benefit.





## Not sure where to start? No problem! Contact an EY planner.

You can contact an EY financial planner through phone or online chat and they'll guide you from there:

#### Phone:

Call the EY Financial Planner Line® at 877 927 1047 9 am to 8 pm ET

#### Online chat:

Log into the EY Financial Planning Center® at PBUCC.eyfpc.com and select the chat feature.

# The EY financial planning benefit helps you manage your money and financial wellness by:

- ► Taking the guess work out of how to integrate your benefits
- ► Reducing debt and increasing cash flow
- ▶ Building a retirement plan that works for you

## How EY helps you build financial wellness.

Whether you're early in your career, getting ready to retire or somewhere in between, EY helps you build a step-by-step roadmap to take control of the money matters in your life and plan for a healthy financial future.

#### Let EY help you take control of your financial wellness.

Protect yourself and your family Manage debt and improve cash flow Know how much and where to save • 401(k), pension & annuities · Health, life and disability insurance · Establish personal financial goals · College funding options · Income tax and withholding · Investment risk and asset allocation · Long term care, Medicare/Medigap Emergency funds assessment options · Reduce credit card debt · Determine if you are on track to retire · Manage household finances · Build a retirement income plan



# Not sure where to start?

Take our financial wellness assessment.

Getting started with EY is easy. All you need to do is register on the EY Financial Planning Center® then complete the online Financial Wellness Assessment. The assessment asks a series of money related questions then provides action items prescribed just for you so you can take immediate steps to improve your financial wellness. With each retake of the assessment, you'll receive new action steps to track your progress.



## We work with you the way you need us to.

The EY financial planning benefit is offered by PBUCC at no cost to you. No matter your age or level of financial understanding, our objective guidance helps you get on the road to financial wellness. You decide how to best interact with us and we'll tailor our approach to you.

## Financial planning guidance and support

EY Financial Planning Center® (EYFPC)

EY Financial Planner Line® (EYFPL)

Live monthly webinars



The EYFPC is your financial planning knowledge center. Here you can learn, evaluate, and plan for all of your financial goals. You'll find informative, entertaining videos selected just for you. The Appointment Scheduler and Click-to-chat features mean your planner is just a click away.



All of our planners are skilled financial professionals. Each time you call the EYFPL you can be sure you're speaking with someone who understands your organization's benefits and who works with people just like you.



Every month we introduce an interactive, 30-minute webinar covering money-related, time relevant topics you need to know.

Onsite financial workshops



Each workshop is created specifically for your organization and with your benefits package in mind. Our financial planner presenters are trained in your company benefits, and can answer your financial planning questions.

Understanding Personal Finances (UPF)



The UPF keeps you current on topics that impact all aspects of your financial wellness efforts. Short, information-packed articles mean messages are easy to scan, understand and put into practice.

Social media and text alerts







Stay connected on current events that can impact your planning efforts. Search for EYEFS on Facebook and @EYEFS on Twitter. Through EY's text feature, we'll alert you to urgent financial actions you can take right from your smart phone.

Just text EYPlanning PBUCC to 313131.

Your EY financial planning benefit helps you manage your money today, save for tomorrow and build a financial wellness plan for you and your family. Make the most of your benefits. Contact EY today.

In order to receive a copy of Form ADV Part 2A, which includes information regarding any investment planning services that may be provided to you, please visit <a href="https://goo.gl/XMgMhP">https://goo.gl/XMgMhP</a>.