

A woman with dark hair, wearing a light pink top, is talking on a white corded telephone. She is looking off to the side with a thoughtful expression. A young child with dark hair, wearing a white shirt with pink floral patterns, is sitting next to her, looking at the camera. The child's hand is near some colorful alphabet blocks on a desk. The background is a bright, out-of-focus indoor setting.

**EY Navigate™**

Frequently  
asked questions



Building a better  
working world





## **Q** What is EY Navigate?

**A** EY Navigate is a highly personalized financial wellness service that guides you each step of the way as you manage the twists and turns of your financial wellness journey. The program offers you a mix of online resources and one-on-one interaction with EY financial planners.

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## **Q** What are the advantages of using EY Navigate?

**A** **EY Navigate breaks down complex tasks into manageable action plans through:**

- A personalized approach
- A user-friendly website and phone line
- An engaging experience that helps you build in healthy financial habits
- Convenient access to all your financial accounts in one secure place online
- Dedicated, objective and credentialed financial planners

**You decide how you want to engage with EY Navigate, including:**

- Online through the EY Navigate website
- By phone with the EY Navigate Planner Line
- In workshops and webinars through EY Navigate Group Learning sessions



**Q** What types of financial goals can EY Navigate help me with?

**A** Once you've registered, EY Navigate presents a series of financial goals. You decide which goals matter most to you and your family, including:

- Living within a budget
- Reducing your debt
- Planning for retirement
- Preparing for the unexpected
- Protecting your legacy
- Making the most of your workplace benefits

You'll be guided through the necessary steps to help you meet each goal and, over time, build healthier financial habits that lead to long-term financial wellness. During the goal-setting process, you can securely connect your online financial accounts through the account aggregation feature.

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**Q** Who are the EY Navigate planners?

**A** EY Navigate planners are highly credentialed, experienced professionals who provide coaching on saving, spending, investing, financial goal-setting and tax planning. EY Navigate planners do not sell any financial products, which means you can count on unbiased, objective financial guidance.

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**Q** How much does EY Navigate cost?

**A** The EY Navigate financial wellness program is offered by The Pension Boards to actively-contributing members of the Annuity Plan, at no cost to you.

**Q** **Is my information safe with EY Navigate?**

**A** Yes. EY Navigate is included in the strict data privacy and security standards practiced by EY member firms.

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**Q** **Will my employer have access to my financial information?**

**A** No. While EY Navigate is offered to you as one of your workplace benefits, your employer will not have access to your EY conversations and online planning sessions unless you provide authorization.

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**Q** **Do I need to talk to a financial planner, or can I use the EY Navigate website on my own?**

**A** While we think you'll get the greatest benefit by using all of the components of the EY Navigate experience, you can work solely through the EY Navigate website if you prefer. If you do work independently, you may want to engage an EY planner when you have complex financial issues and need extra help.

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**Q** **How can I start using EY Navigate?**

**A** You can begin using EY Navigate by registering at **[pbucc.eynavigate.com](https://pbucc.eynavigate.com)** or calling **1.877.927.1047**.

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