

**EY Financial Planner Line® (EYFPL)**

for actively-contributing members of the Annuity Plan  
for the United Church of Christ

**877-927-1047**

# Take control of your financial wellness.

The *EY Financial Planner Line®* can help.

Six good reasons to call the *EY Financial Planner Line®*:

1. You aren't sure if the money in your retirement account is invested correctly
2. You need assistance managing debt or addressing cash flow issues
3. You don't know if you're saving enough for retirement
4. You aren't sure if you have appropriate insurance coverage
5. You have questions regarding taxes or withholding
6. You aren't sure what should be included in your estate planning documents

For more information contact an EY financial planner at **877-927-1047** or log on to **pbucc.eyfpc.com** and select the chat feature in the upper right hand portion of your screen.

Welcome to the *EY Financial Planner Line®* (EYFPL) for actively-contributing members of the Annuity Plan for the United Church of Christ. We've created this list of frequently asked questions to help you make the most of your financial planning benefit.

**Q. What is the *EY Financial Planner Line®*?**

**A.** The *EY Financial Planner Line®* is an important part of your personal financial planning benefit. With EY, you have unlimited, toll-free access to financial counseling over the phone. EY financial planners will help answer your financial questions, and educate you on all of your money-related needs and goals. The EYFPL is offered at no cost to you and there is no limit on the number of calls you can make.

**Q. What is financial planning and what will I be able to do?**

**A.** Financial planning helps you create a personal financial wellness plan by building strategies to reduce debt, save money and meet your life's goals.

**Q. Who are EY's financial planners?**

**A.** EY financial planners are experienced, credentialed Ernst & Young professionals who understand PBUCC programs and benefits. They are specially trained to provide financial guidance that is independent, objective and confidential.

**Q. How will a financial planner help me?**

**A.** Your planner can help you learn how to:

- Spend less and save more
- Plan for retirement, college and other goals
- Build an income distribution plan when you're ready to access your savings and annuity
- Assess insurance and estate planning needs
- Cut down on credit card debt
- Set up a household budget

Your EY financial planner also prepares personalized financial reports that provide a roadmap to:

- Understand where your money goes
- Determine your net worth
- Select the best insurance protection for you
- Build your retirement plan
- Identify the best way to invest for retirement
- Help you transition to retirement

**Q. Can I have my spouse, partner, family member or other financial advisor on the phone with me?**

**A.** Yes. In fact, we encourage you to include others who share your personal finances to participate in your calls.

**Q. Do I need to gather my financial data before placing my first call to the *EY Financial Planner Line®*?**

**A.** No. Your financial planner will help you determine the best way to start the financial planning process. Together you'll identify the information or paperwork you will need for a subsequent call.

**Q. What are the hours of operation?**

**A.** EY financial planners are available to help you Monday through Friday, 9am to 8pm Eastern Time excluding holidays.

**Q. If I want to speak with a financial planner, do I need to schedule an appointment?**

**A.** No appointment is necessary. Simply call during the hours of operation. However, if you prefer to schedule an appointment at a time that works best for you, you can do so through the *EY Financial Planning Center®* at **pbucc.eyfpc.com**. If you prefer to work through your desktop or mobile device you can also chat with a planner through the *EY Financial Planning Center®*.



**Building a better  
working world**