

Take the journey to financial confidence



Take a path to meet your short- and long-term financial goals with a financial plan that includes your faith and values, and can be part of your guideposts on your pastoral leadership journey.

Financial planning from Everence® offers ways to help you find opportunities, prevent detours, and get there with a tailored, detailed road map that includes specific branches of your financial life:

- Cash flow planning
- Protection planning
- Investment planning
- Tax planning
- Retirement planning
- Estate planning
- Charitable planning

And if you're an active, credentialed congregational pastor, learn about a special subsidy offer on the first-year financial planning fee. Find more details on the next page or talk to us to learn more.

“Financial planning provided us an opportunity to reflect on goals like saving for college and retirement, and encouraged us to make decisions that will benefit our family in the future.”

– Pastor from Iowa

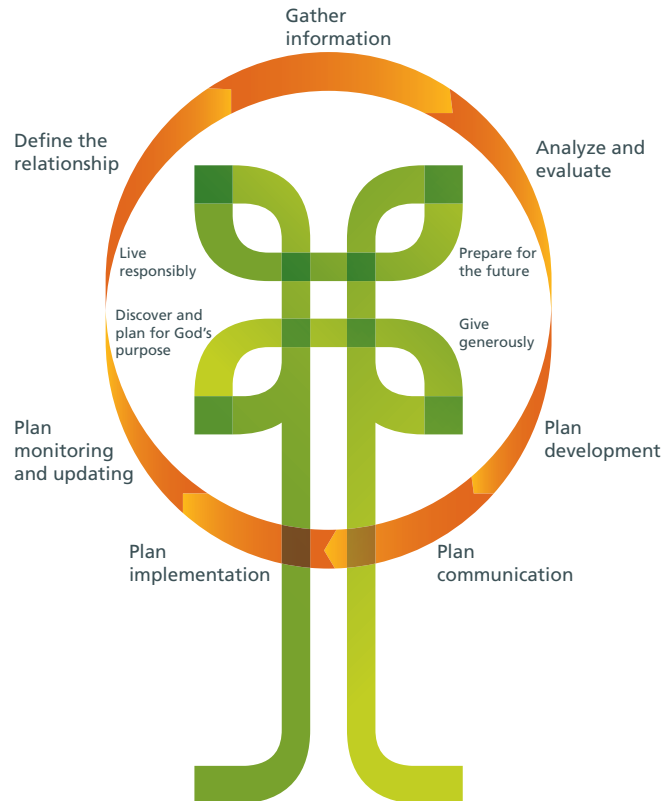


Everence®



The process

The Everence financial planning process includes seven steps to help you develop, monitor and update your plan – and benefit from our ACE approach, which can help you align your goals and life mission with your financial decisions, increase confidence in your financial future, and empower you to give your time, talent and resources to the people, causes and organizations you care about.



Powerful online tools

As part of our financial planning, you gain access to our powerful online software, Vine Vision 360, to help you organize and track your finances and progress.

Here to help

Through the Everence Pastoral Financial Wellness Program, active and credentialed congregational pastors are eligible for a subsidy to help with the \$1,200 cost of a first-year Pastoral Select Plan or the \$1,500 cost of a first-year Pastoral Comprehensive Plan. The subsidy – funded by a Lilly Endowment grant – covers \$1,000, and pastors are asked to contribute a \$200 or \$500 co-pay, which churches may help to pay.

Talk to us to learn more or visit everence.com.

Everence offers credit union services that are federally insured by NCUA. Investments and other products are not NCUA or otherwise federally insured, may involve loss of principal and have no credit union guarantee. All products are not available in all states.