



Are you ready for a financial planning conversation?

Five reasons to talk with a financial planner

Financial planning isn't just for the super-wealthy. Anyone can benefit from the guidance of a credentialed, experienced and objective planner. Here are five situations that make you a good candidate for a conversation.

1. You don't have time or expertise to work on your finances. Most people lead busy lives and financial planning often ends up on the back burner. That's why it's good to have a professional financial planner on hand to offer time-saving knowledge and guidance. Whether you want to get out of debt, build an emergency fund, make the most of your employee benefits, plan your retirement, or address estate planning, your EY planner will break down even complex tasks into manageable steps so that nothing will be too overwhelming for you to tackle.

2. You'd like to feel more confident about your finances. According to a survey from Northwestern Mutual, people working with a financial planner are more likely to say they feel happy, confident and stable. Whether you don't know where to begin or have multiple financial goals to manage, a conversation with an EY planner can help clarify what's important to you, set your plan in motion, and help you take charge of your finances.

3. You're looking for personalized, objective and actionable help. We all have unique financial needs and goals based on where we are in life. Your EY planner will provide direction tailored to your situation and with only your financial interests in mind.

4. You want to keep your emotions in check. Your EY planner can be a sounding board when a market downturn, a pandemic, or some other disconcerting event leaves you feeling anxious about your finances. Your planner can put things in perspective, steer you away from high-risk practices like market timing, and keep you focused on principles of sound financial planning.

5. You need an ongoing nudge to keep you on track. Your EY planner will stay in touch to keep you focused on your plan, help you make informed decisions and stay on track toward achieving your goals. They will help update your planning as needed to stay current with changes in your life and goals.

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Pension Boards-United Church of Christ covers the full cost of this program.

- 📞 Contact an EY planner at **1 877.927.1047**
- 🔗 Log into **pbucc.eynavigate.com**