



Don't just think about getting your finances in order, **make it happen**

## Let EY Navigate™ guide you toward a stronger financial future

Financial matters impact everyone – no matter your personal situation or where you are in life. EY Navigate is a highly personalized financial wellness service that makes it easy for you to develop healthy habits and work on your financial goals, one by one.

### EY Navigate provides:

- ▶ Dedicated, credentialed and objective financial planners who provide guidance that is completely confidential
- ▶ Secure, 24/7 online access that helps you address the goals that matter most, provides resources and tools, and enables you to aggregate all your financial accounts in one secure place
- ▶ Live webinars through EY Navigate Group Learning

### Access EY Navigate



**Call an experienced financial planner** who will help you set goals, plan for retirement, get the most out of your employer benefits and much more

**Log in to EY Navigate** so you can work on your financial goals, aggregate your financial accounts, and access resources and tools to help you build healthy financial habits

**Attend online webinars** monthly to learn about a variety of financial planning topics and stay on track toward your goals

EY Navigate provides unlimited access to financial planning **at no cost to you.**

### Contact EY today

Call a financial planner at  
📞 **1.877.927.1047**  
Monday-Friday  
9 am - 8 pm ET

Register at  
📍 **pbucc.eynavigate.com**



# Personal financial planning made easy

For actively-contributing members of the Annuity Plan through **The Pension Boards**

EY Navigate provides unlimited access to financial planning **at no cost to you.**

Taking control of your finances is easier than you think. Start small by taking a few simple steps, and, when you're ready, we'll help you build a comprehensive wellness plan tailored to your unique needs and goals.

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



### Protect yourself and your family

- ▶ Assess your needs for health, life and disability insurance
- ▶ Explore college funding options
- ▶ Understand long-term care and Medicare/Medigap options



### Manage debt and improve cash flow

- ▶ Establish personal financial goals
- ▶ Know the basics of income tax and withholding
- ▶ Build an emergency fund
- ▶ Reduce credit card and student loan debt
- ▶ Manage household finances



### Know how much and where to save

- ▶ Get more out of pensions and annuities
- ▶ Manage investment risk and asset allocation
- ▶ Determine if you're on track to retire
- ▶ Create a retirement income plan

Move forward with confidence in your financial journey. Contact EY today.