

EY Financial Planning Center® (EYFPC)

for actively-contributing members of the Annuity Plan
for the United Church of Christ
pbucc.eyfpc.com

Take control of your financial wellness.

The *EY Financial Planning Center®* can help.

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 Planning Center®* (EYFPC) 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 Planning Center®*?

A The *EY Financial Planning Center®* (EYFPC) is your online resource for financial education and real-time planning. Here, you can learn about financial planning topics, evaluate your personal situation with calculators, questionnaires and other personal assessment tools, and create your personal wellness plan. You even have access to step-by-step EY recommendations for navigating major life events.

Q Do I have to register to use the *EY Financial Planning Center®*?

A Yes. You will need to create a unique user name and a password to gain access. Then, the EYFPC will prompt you to provide your member ID, date of birth and zip code. Each time you log in, simply provide your email address and password and you're in! Once you're registered, you'll be prompted to complete the Financial Wellness Assessment questionnaire. Your responses help create a unique EYFPC experience customized for you. To register go to **pbucc.eyfpc.com**.

Q What can I do on the EYFPC website?

A The *EY Financial Planning Center®* video is located on the login page. It is a 90-second overview of the EYFPC so you can learn how to use the site. Once you've logged in you have access to:

- **Financial Wellness Assessment** — a brief questionnaire that helps us understand how we can best provide information and action items based on your current financial situation
- **Action items** — serves you personalized action steps and checklists to help keep you on track
- **Learn tab** — access to a wealth of easy-to-read financial planning topics and short videos
- **Evaluate tab** — try EY calculators for saving and spending scenarios, access questionnaires and other tools
- **Plan tab** — let's you work independently or collaborate online with an EY financial planner to build your personal financial plan
- **Life events tab** — provides step-by-step EY recommendations for navigating life's major milestones
- **Appointment scheduler** — schedule an appointment with a planner for a time that works best for you
- **Document center** — allows you to share and securely upload personal documents with your planner
- **EFS monthly webinars** — sign up for live EY monthly webinars on financial topics
- **Media library** — view previously recorded webinar sessions by topic
- **Links & tools** — access PBUCC benefits and resources

Q Can I reach my financial planner through the EYFPC?

A Yes. The EYFPC let's you send messages directly to your planner. You can "speak" with your planner through the EYFPC's chat feature and collaborate online to build your financial plan. You can also set an appointment with a planner, for a time that's convenient for you, through the Appointment Scheduler feature.

Q Where do I get help if I'm experiencing technical issues when using the EYFPC?

A You can call **1-888-372-3915** from 9am ET to 8pm ET for any technical issues.



**Building a better
working world**