

# Personal Action Plan



## Thank you for attending Personal Finance 101

We've identified a few key action items below that will help you put your new knowledge into action and stay on track going forward.

### 🕒 Today

- Register at [pbucc.eynavigate.com](https://pbucc.eynavigate.com) and
- Download the EY Navigate App
- Text 'Wksp PBUCC' to 313131 for a link to EY Navigate

### 🕒 Next 3 days

- Call the EY Navigate Planner Line at **877.927.1047**
- Start tracking your daily spending (for 30 days)

### 🕒 Next week

- List and prioritize your goals
- Calculate your retirement timeline

### 🕒 Next month

- Prepare or update your Net Worth Statement
- Calculate your Debt-to-income ratio
- Review your asset allocation and consider the appropriate TAD fund for you

### 🕒 Next 3-12 months

- Develop a plan for your emergency fund
- Visit [annualcreditreport.com](https://annualcreditreport.com) every 4 months
- Access a consistent source to view your credit score
- Discuss and calculate your family life insurance needs
- Prepare and update core estate planning documents and asset titling

Pension Boards-United Church of Christ provides unlimited access to financial planning **at no cost to you.**

### Connect with EY

**Call** a financial planner at **+1 877.927.1047**

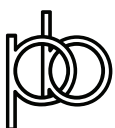
Monday-Friday  
9 a.m. - 8 p.m. ET

**Register** at [pbucc.eynavigate.com](https://pbucc.eynavigate.com)

Notes | additional items:

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**The Pension Boards**  
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WHERE FAITH AND FINANCE INTERSECT

