



Wespath

BENEFITS | INVESTMENTS

2016 Participant Survey

Introduction

In support of the mission of The United Methodist Church, Wespath Benefits and Investments (Wespath)* is committed to providing excellent customer service, communication materials and education to current and former clergy and lay participants in Wespath-administered retirement plans and their beneficiaries.

We would greatly appreciate receiving your feedback regarding how well we have met your needs.

Please take a few minutes to complete this brief survey by **September 8, 2016**. Your feedback will help us enhance our services.

Thank you for your time and feedback.

** Wespath Benefits and Investments was formerly known as the General Board of Pension and Health Benefits. In July 2016, we changed our name to Wespath Benefits and Investments, completing a rebranding process that began in 2010 when we named our investments division Wespath Investment Management.*



2016 Participant Survey

Participant Services

1. Indicate what features of Wespath's participant service offering you value most by ranking the choices below from 1 (highest value) to 6 (lowest value).

<input type="text"/>	Customer Service Call Center (Wespath representatives that you contact by phone or e-mail)
<input type="text"/>	EY Financial Planning Services (comprehensive financial planning services provided by EY, formerly Ernst & Young)
<input type="text"/>	LifeStage Investment Management (Wespath's autopilot investment allocation service)
<input type="text"/>	LifeStage Retirement Income (Wespath's autopilot distribution management service)
<input type="text"/>	Benefits Access (Wespath's participant website portal)
<input type="text"/>	Events/webcasts (Clergy Benefits Academy and revitup!, or webcasts hosted by a Wespath benefits educator)

2. What participant service features are you interested in learning more about? (Check all that apply.)

- Customer Service Call Center
- EY Financial Planning Services
- LifeStage Investment Management
- LifeStage Retirement Income
- Benefits Access
- Events/webcasts



2016 Participant Survey

Communications

3. Which best describes your impression of communications from Wespath?

- Keeps me fully informed about services and resources
- Keeps me adequately informed about services and resources
- Gives me only a limited amount of information about services and resources
- Doesn't tell me much at all about services and resources
- Comments:

4. Which best describes the amount of information you receive in communications from Wespath?

- Communications provide too much information
- Communications provide the right amount of information
- Communications provide some information, and let me know where/how I can learn more
- Communications provide too little information
- Comments:

5. Which best describes the frequency of communications you receive from Wespath?

- I receive communications too frequently
- I receive communications with the right frequency
- I wish I received more communications
- Comments:



2016 Participant Survey

Financial Wellness

6. Is your overall financial wellness important to you?

- It's a very high priority
- I prioritize many other things higher
- Neutral
- I rarely think about financial wellness
- I don't care about financial wellness

Comments:

7. How confident are you that you will be able to meet your personal retirement income goals?

- Very confident
- Somewhat confident
- Neutral
- Not confident at all

Comments:



2016 Participant Survey

**Customer
Service**

8. Overall, how would you rate the quality of your most recent Customer Service Call Center experience?

- Very positive
- Somewhat positive
- Neutral
- Somewhat negative
- Very negative
- I have not contacted the Customer Service Call Center

Comments:



2016 Participant Survey

Customer Service Use

9. How well did the Customer Service Call Center representative understand your questions and concerns?

- Extremely well
- Very well
- Somewhat well
- Not so well
- Not at all well

Comments:

10. How helpful was the Customer Service Call Center representative you worked with?

- Extremely helpful
- Very helpful
- Somewhat helpful
- Not so helpful
- Not at all helpful

Comments:

11. How much time did it take Wespath to address your questions and concerns?

- Much shorter than I expected
- Shorter than I expected
- About what I expected
- Longer than I expected
- Much longer than I expected
- I did not receive a response

Comments:

12. How likely is it that you would recommend the Wespath Customer Service Call Center to a fellow participant?

- Extremely likely
- Very likely
- Somewhat likely
- Not so likely
- Not at all likely

Comments:



Wespath
BENEFITS | INVESTMENTS

2016 Participant Survey

Contact

13. May we contact you about your survey response?

- Yes
- No



2016 Participant Survey

Contact
Information

14. Name

15. E-mail Address

16. Phone Number



Wespath
BENEFITS | INVESTMENTS

2016 Participant Survey

**Thank
You!**

Thank you for taking time to complete this survey. Please click the "Done" button below.