



# Wespath

BENEFITS | INVESTMENTS

Don't delay—try your Benefits  
Access retirement tools today!



a general agency of The United Methodist Church

Wespath offers projection tools to help you see your financial future. See the fruits of your retirement planning and make adjustments to meet your goals.

## Retirement Readiness Tool

A simple bar graph shows you:

- How much you're projected to have saved by retirement
- The amount you're projected to need
- Any projected shortfall or surplus for your first year of retirement

It shows you how all of your assets work together, including:

- Your Wespath-administered retirement account balances
- Your estimated Social Security benefits
- And even retirement savings you have in non-Wespath accounts (based on self-entered data)



Use our sliders to personalize what you see—learning how various factors can impact your retirement readiness.

Also, find out how delaying your retirement, reducing your discretionary spending and increasing your retirement plan contributions can improve your financial picture.

Select **“Learn”**; under **Retirement Projection Tools** choose **“Retirement Readiness.”**

## Retirement Benefits Projection

Provides a deeper understanding of your distribution options for Wespath-administered accounts.

### Compare scenarios by:

- Learning the value of each of your retirement accounts projected to retirement
- Walking through your choices for taking distributions, including LifeStage Retirement Income
- Reading a summary of your projected benefits in an easy-to-read report

Select “**Learn**”; under **Retirement Projection Tools** choose “**Retirement Benefits Projection.**”



## LifeStage Retirement Income Calculator

Transitioning from saving to spending can be difficult. LifeStage Retirement Income can help you decide how much to take in distributions from your retirement accounts to help your payments last your lifetime, when to adjust those payments and by how much.

If you aren't sure whether LifeStage Retirement Income is right for you, or if you'd like to manage your own distributions but would like guidance, use the LifeStage Retirement Income Calculator in Benefits Access: The calculator lets you see how much your payments will be if you elect LifeStage Retirement Income.

Select “**Learn**”; under **Retirement Projection Tools** choose “**LifeStage Retirement Income Calculator.**”

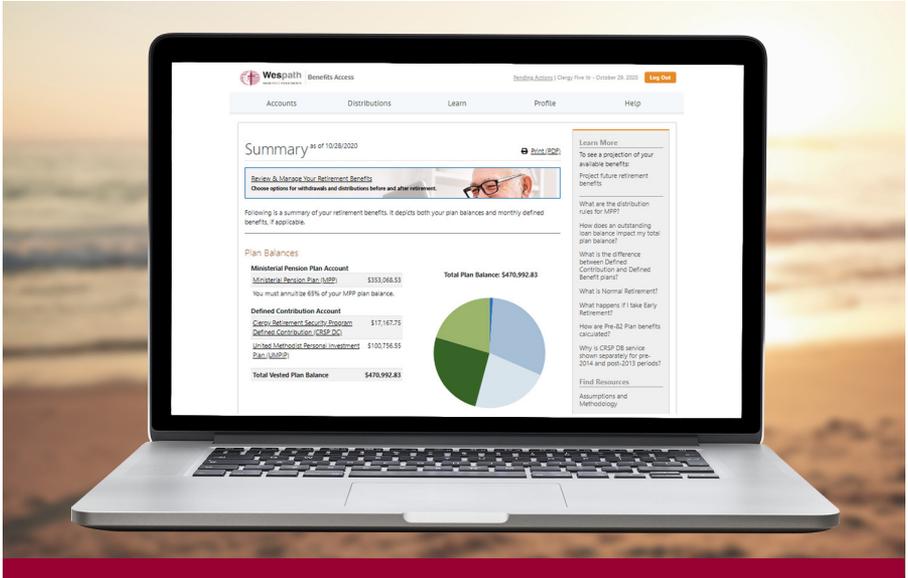


# Wespath

BENEFITS | INVESTMENTS

*Caring For Those Who Serve*

1901 Chestnut Ave.  
Glenview, IL 60025-1604  
800-851-2201  
wespath.org



Don't put your retirement planning on hold.  
Give Benefits Access a try today!

**How do I start? It's easy!**

1. Go to **benefitsaccess.org**
2. Click **"New user registration"**

Follow the step-by-step directions to complete your registration, then:

To access the tools, select **"Learn"**; under **Retirement Projection Tools** choose **"Retirement Benefits Projection," "Retirement Readiness"** or **"LifeStage Retirement Income Calculator."**