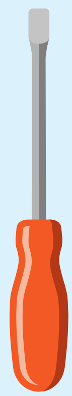
Your Financial Planning Tool Box

Concordia Plans cares about you and wants to help you build a better financial future. From improving your everyday finances to retirement goals, we have the blueprint to help you get there.

What are my benefits?

Personal Statement of Benefits provides an overview of your Concordia Plans benefits, and is located in the "Communications Center" of the Member Portal.

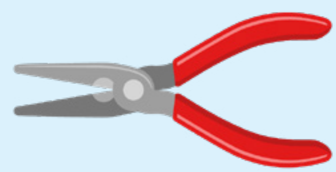
- Review your disability and life benefits.
- View your projected Concordia Retirement Plan pension benefits.
- Learn about the other financial benefits being provided to you.



Zooming in on my 403(b) investments.

Fidelity NetBenefits provides information about your Concordia Retirement Savings Plan 403(b) account.

- View your statement and earnings.
- Change your beneficiary.
- Make rollovers/transfers into your account.



A closer look at my financial future.

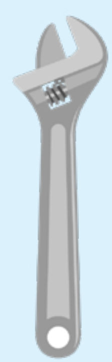
Vision provides a view of your potential retirement income sources all in one place so you can:

- See if you are on track for retirement.
- Review suggested changes you can make to achieve your goals.
- Adjust your CRSP 403(b) elections.

Retirement is just around the corner: decision time!

Retirement Connection helps you explore your pension benefit options and initiate the retirement process.

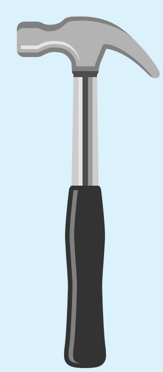
- Run estimates of your Concordia Retirement Plan benefit(s).
- See how your retirement age directly affects your benefits.
- Visit **retirementconnection.ehr.com**.



Help!

Our Education Team is here to help:

- Speak to a team member by phone or virtual appointment (using the contact information below) for one-on-one assistance.
- Develop a personal financial plan.
- Model and compare different retirement income and expense scenarios.



Find all these resources on your Member Portal by visiting **ConcordiaPlans.org/MemberPortal**. For more information, contact **MoneyMatters@ConcordiaPlans.org** or call **888-927-7526, ext. 6865**.

CONCORDIA PLANS