



The Council for Health &
Human Service Ministries
United Church of Christ

The Pension Boards: Your Covenant Partner for Employment Benefits



The Pension Boards
United Church of Christ, Inc.

2023 CHHSM Annual Gathering: Together through Mountains and Valleys »



Mission of the Pension Boards

Operating at the intersection of faith and finance, we are caring professionals partnering with those engaged in the life of the Church to provide valued services leading to greater financial security and wellness.



About Us

- Our History Since 1914, the Pension Boards-United Church of Christ, Inc. (PBUCC) has been a partner in ministry with those who serve the United Church of Christ.
- We offer comprehensive employee benefits programs for active and retired UCC clergy and lay employees and their eligible dependents, providing the highest standards of service, access and options.
- We assists those who serve the church in achieving health and economic security through leadership regarding faith-based, socially responsible investment management, and a comprehensive mix of products and services that meet diverse needs.

Current CHHSM Partners

Advocate Health Care

Back Bay Mission

Brewster Place

CHAMP Homes, Inc.

Crossroad Child & Family Services

Deaconess Foundation

Eden Church

Emmaus Homes, Inc.

Fairhaven Senior Services

Franklinton Center at Bricks

Hitz Memorial Home

Immanuel House

Samaritan Bethany

St. Paul's – A Continuing Care
Community

United Church Homes, Inc.

Unleashing Potential

The Christmas Fund

To learn more about the Christmas Fund
Visit: www.christmasfund.org.



Christmas Fund Overview



To learn more about the Christmas Fund visit pbucc.org > Faith & Finance

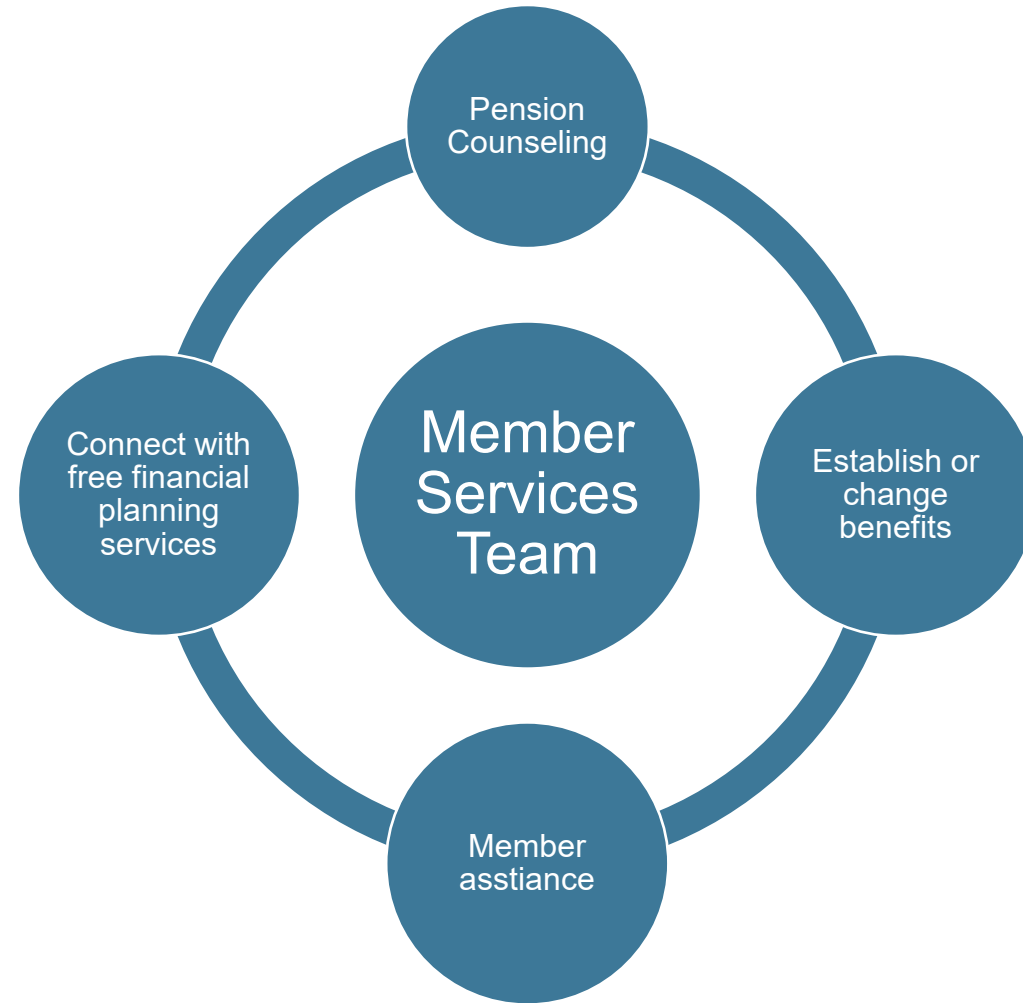
Sacred Conversations to End Racism

SACRED CONVERSATIONS
TO **END** RACISM



<https://www.ucc.org/what-we-do/justice-local-church-ministries/justice/fair-faithful-action-ministries/racial-justice/>

Connection with our Members





Pension Boards Benefit Plan Highlights

Comprehensive offering of Medical, Dental, Vision, and Insurance Plans

UCC Medical Plan

- Blue Cross/Blue Shield Plan Options
- No-Cost Preventive Care
- Member Assistance Program
- Healthy Stewards Wellness Rewards
- Flexible Spending Account
- International Medical Coverage
- Pharmacy Services
- Teladoc
- Maternity Benefit

Dental, Vision, Life Insurance, and Pet Insurance

- Dental Plan (United Concordia)
- Vision Plan (VSP)
- Life Insurance and Disability Income Plans (MetLife)
- Pet Insurance (MetLife)

Annuity Plan for the United Church of Christ

Highlights

- Open to anyone working for a UCC employer
- Lifetime retirement income funded from employer and/or employee funds
- Tax-deductible savings opportunities
- Various investment options available
- Professional money management with a “double bottom line approach” more than just the
- Financial wellness tools and resources included

PBUCC's "Double Bottom Line" Approach to Investing



PBUCC *Limits* Investments in Certain Industries



Investment Options from PBUCC: Accumulation Funds

Approach A: You pick and monitor your mix of PBUCC Accumulation Funds over time

Fund Name	Anticipated Return/Risk
Stable Value Fund	Lowest
Bond Fund	Lower
Sustainable Balanced Fund	Moderate
Equity Fund	Higher
Northern Trust Global Sustainability Index Fund	Higher

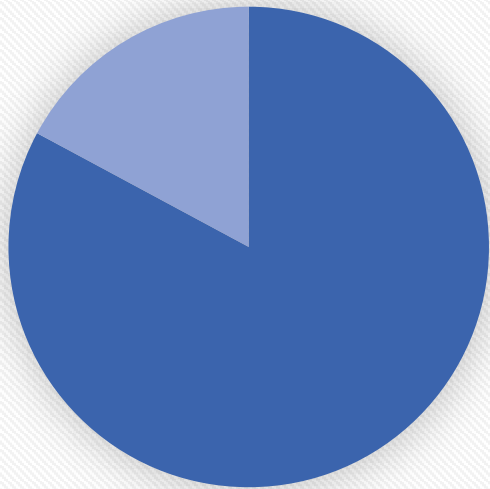
Future returns may differ from historical returns

You can view risk and returns for PBUCC's Accumulation Funds, on PBUCC.ORG > Investments > Quarterly Summaries

How PBUCC Target Annuitization Date (TAD) Adjust Over Time*

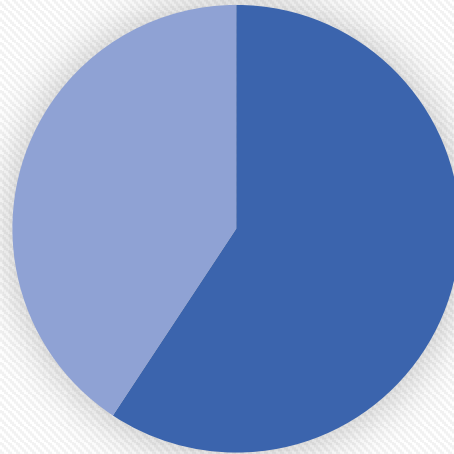
Approach B: Automatic investment and adjustment

2050 TAD Fund



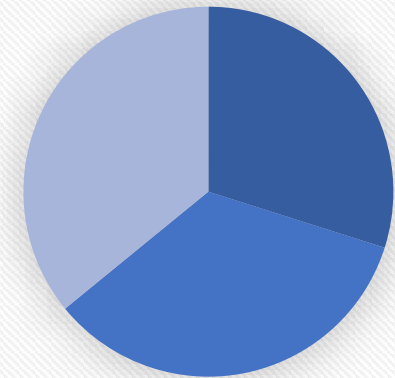
■ Equity Fund ■ Bond Fund

2035 TAD Fund



■ Equity Fund ■ Bond Fund

2025 TAD Fund

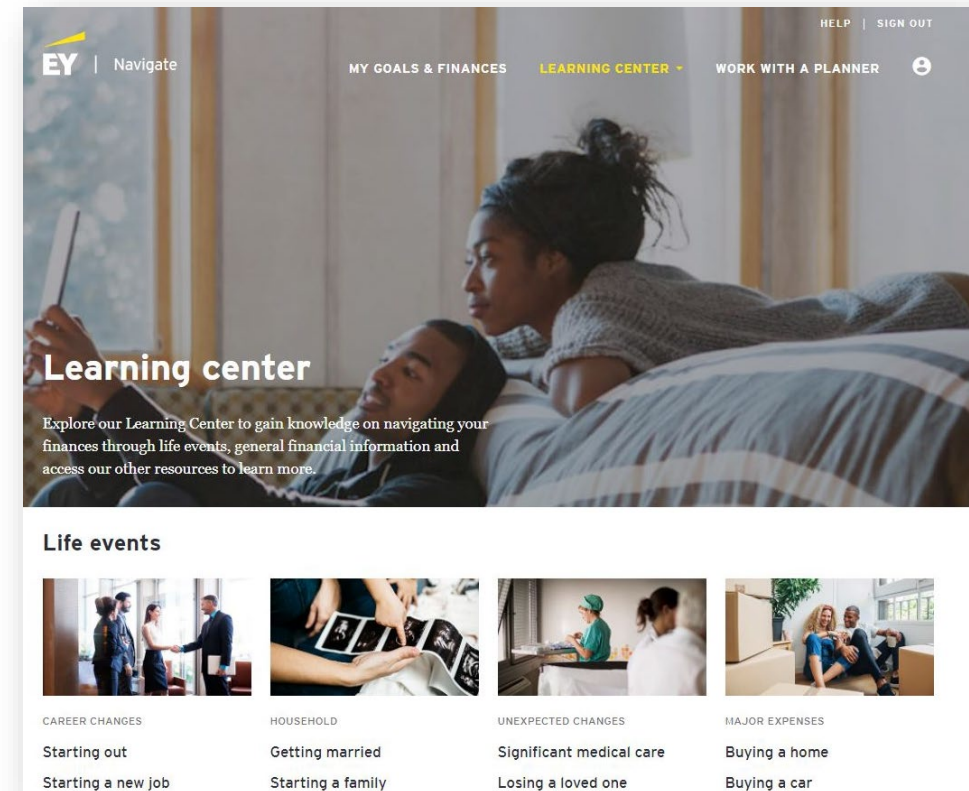


■ Equity Fund
■ Bond Fund
■ Stable Value Fund

TAD Funds (2025,2030,2035,2040,2045,2050) are automatically rebalanced, diversified, and reduce stock market risk as you approach retirement!

What is EY Navigate Digital™ Website?

- A robust financial planning website
- Register upon your first visit to the website
- Complete a brief questionnaire and the site will automatically guide you to important information and action items
- Learn, evaluate, and plan your personal financial needs.
- You can chat online with a planner, register for monthly EY financial webinars and set up an appointment with a planner.



EY Navigate™ Financial Planner Line

- Unlimited access to financial counseling over a toll-free number dedicated to Pension Boards members. **(1.877.927.1047)**
- They will provide objective guidance. They are not paid commission. EY Planners can help you:
 - create a retirement plan
 - determine how much to save for retirement
 - make investment decisions
 - budget your money
 - determine insurance needs and options
 - manage credit card and other debt
 - reduce and manage taxes, and more!





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Travis Marks, Maria Soto, and Paul Ramsey



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tmarks@pbucc.org, msoto@pbucc.org, pramsey@pbucc.org

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