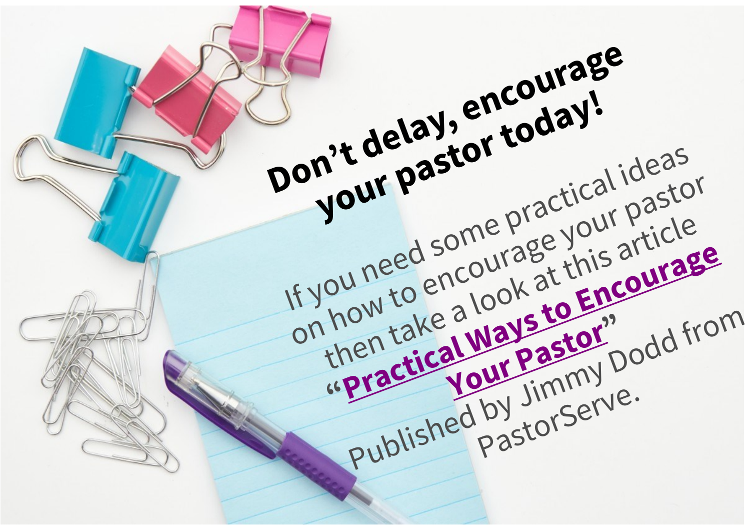
EPC Benefit Resources, Inc.

# For Your Benefit…

March 10, 2021




## When was the last time you updated the designated beneficiaries on your retirement account?

It's important that you have designated your beneficiaries to ensure your loved ones will receive the assets you intend them to have without going through a probate process upon your death.

Not sure if you ever designated your beneficiaries or added dependents as your family has grown?
It is easy to check, just go online to your EPC account with Fidelity at www.netbenefits.com/EPC or go to our **Benefits** website to fill out the appropriate forms to submit by mail.

### Tips for naming or changing your beneficiaries:

**Have** the following information available:
name, relationship, date of birth, address, and Social Security number.

**Review** and update your beneficiary designations periodically, particularly when you experience a major life event such as a birth, marriage, divorce, or death in the family.

**Ensure** your allocation percentages add up to 100% for both the primary and secondary (contingent) beneficiaries if you are naming more than one beneficiary.

## ADMINISTRATOR CORNER

- ➔ Thank you all for helping BRI communicate with your staff & pastors about important benefit news and information! We are so thankful for all you do to help us!
- ➔ If you know of anyone who is not receiving our newsletters then please have them visit www.epc.org/benefits/newsletter to sign up or click **here** to subscribe them.
- ➔ FYI...when printing this newsletter it is best if printed on legal size paper. Please share & post all our newsletters. Thank you!

## EPC Retirement Plan Monthly Workshop

Join EPC Benefits Resources Inc. and Fidelity for our once-a-month educational virtual workshop.
This month's workshop:

**Fidelity Personalized Planning & Advice**

**Tuesday, March 23 at 12:00 PM ET**

- ➔ EPC's Plan allows you to obtain free investment advice at any time from a licensed Fidelity investment counselor. In fact, we even offer a brokerage window that allows our participants to create their own portfolio outside of our 22 pre-selected funds. But for most of us, understanding the whys and wherefores of the financial markets is a mystery best left to the experts to resolve. If you are one of those folks, this workshop may provide you with the perfect solution.
- ➔ Fidelity's Personalized Planning and Advice will show you how to create and implement a financial plan specific to your retirement goals that will consider both your EPC Plan, any other Plans or retirement savings you and your spouse may have.
- ➔ If you elect to participate in this program Fidelity investment managers will take over proactive management of your account based on the goals you have set leaving it to the experts to keep you on track for retirement. There is a fee charged for these services by Fidelity that will be discussed during the workshop.

**CLICK HERE TO REGISTER!**

Did you know that everyone enrolled in an EPC medical plan-can get personalized health coaching from a Highmark Wellness Coach!

Your coach can support you with:

- **Losing weight**
- **Sleeping better**
- **Reducing stress**
- **Managing chronic conditions**

**There is no charge for EPC plan participants for these services.*

Call 1-800-650-8442 to get connected with a coach
8:30 am - 8:30 pm, Mon-Fri ET
or click **here** to learn more.