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 – what you have today with your Concordia Plans benefits.
- Review your current benefit elections.
- View your projected pension benefits from the Concordia Retirement Plan.
- Learn about the other financial benefits being provided to you.

Managing my everyday finances.

The BeFine™ app and website make it easy for you to see a clearer picture of your finances, so you can:
- Organize expenses and create a budget.
- Create a plan to reduce debt.
- Establish an emergency fund and other financial goals.
- Prepare for retirement.

This free app can be accessed by visiting befineapp.com/concordia-plans.

Zooming in on my 403(b) investments.

Fidelity NetBenefits – information about your CRSP 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 – a view of your potential retirement income all in one place so you can ask yourself:
- Am I on track for retirement?
- What are the tradeoffs and scenarios I can adjust to achieve my goals?

And then:
- Make changes to your Concordia Retirement Savings Plan 403(b) elections.

Retirement is just around the corner: decision time!

Retirement Connection – 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.

Help!

Our Education Team is here to help:
- Speak to a team member by phone or virtual appointment for one-on-one assistance.
- Model and compare different retirement income and expense scenarios.
- Request additional information or financial worksheets.

Find all these resources on the Financial Wellness tab of your Member Portal by visiting ConcordiaPlans.org/MyAccount. For more information, contact MoneyMatters@ConcordiaPlans.org or call 888-927-7526, ext. 6865.