guidestream
an FM Financial company

FOR PLAN SPONSORS

NEWS ABOUT YOUR CHURCH

Retirement Plan

AND WHAT TO EXPECT

We are excited to share an announcement regarding a major milestone in our commitment to your ministry's financial health: we have partnered with Penserv Plan Services as the Recordkeeper for your 403(b)(9) Retirement Plan.

Plan Provisions & Website Enhancements

Known for their experience with church plans, PenServ offers up-to-date features, customizable options, and convenient plan managing tools to improve your plan managing experience.



Enhanced Employer Dashboard: The administrative website features streamlined contribution reporting, real-time data validation, and simplified employee management tools.



Expanded Plan Provisions: With new plan features added, your staff can take advantage of greater financial flexibility.



Convenient Account Access: Participants can manage their accounts through an intuitive, desktop or mobile-friendly interface featuring interactive retirement calculators, personalized savings targets, and financial wellness education.



Seamless Investment Tracking: Participants will enjoy a much clearer, dynamic view of how their Board-managed investment portfolios are performing.

Your Financial Advisor

GuideStream Financial will oversee the operation of the Plan and fully manage and provide the investment options offered to Plan Participants. For questions about investments or financial planning, please call (517) 750-2727.

What To Expect Next

There is no immediate action required on your part at this time.

In the coming weeks, you will receive announcements and updates including:

- The official go-live date for the new platform.
- The Sponsor's Retirement Plan Transition Guide with comprehensive, step-by-step instructions.
- Free live informational webinars that walk you through the new tools and answer your questions. (Sign-up links to be provided)
- Plan materials will be provided to help your staff with plan enrollment, account activation, and managing their personal accounts.

PENSERV PLAN SERVICES
www.penserv.com

For questions about contributions, available investment options, or other financial planning matters, GuideStream can be reached at (517) 750-2727.