

Retirement Plans Where
**Everyone Can
Invest Well**



Experience.

For 25 years, Envoy has solely focused on the unique retirement needs of churches, ministries, and denominations.

From dealing with issues concerning housing allowance to understanding the sensitive nature of overseas communication with missionaries, Envoy can provide a higher level of service compared to those who typically work with secular companies and 401(k) plans. Plus, Envoy employs Christians, many with church and ministry staff experience.

Envoy provides everything you need in one powerful solution

including Investment Advisory, Third-Party Administration, Recordkeeping, Education, and Support.



Investing.

Everyone can invest well.

Envoy Advisory's Open Architecture Platform offers access to over 25,000 investment products from some of the largest and well known fund families. Our systematic investment selection process for Mutual Funds and ETFs is independent, monitored, and innovative. Whether your employees are novice or knowledgeable investors, there is an investment approach that will fit their needs. They can choose from a list of carefully screened and monitored Mutual Funds or ETFs or they can choose from different types of managed models.

Envoy's exclusive online tools and plan builder walk you through everything you need to know and all the decisions you have to make with starting a new plan. In addition, Envoy specialists are available to answer any questions and help you tailor a plan to your specific needs.



Administration.

Simple administration saves time and reduces stress.

Envoy takes care of your retirement plan needs including recordkeeping and all the requirements of a third-party administrator. Plus, Envoy offers one-on-one professional, yet friendly, support, and 24/7 access to the Help Center for both plan administrators and participants.

Envoy has made enrollment quick, easy, and educational.

It all begins with a series of emails to encourage and direct participants to enroll online. Once they start the enrollment process, they are guided through each step with interactive and educational tools, videos, and calculators. Learn more at [Envoyfinancial.com/smartplan](https://envoyfinancial.com/smartplan)



Support.

Available 24/7 for both you and your staff.

Offering amazing customer support is at the heart of all Envoy does. Envoy offers one-on-one professional, friendly support via phone, email, or chat plus 24/7 access to an online Help Center for both plan administrators and staff. In addition, your staff can schedule meetings with a personal advisor.

Education is a priority that is applied to every step of your participants' journey from enrollment to retirement.

This includes access to free resources such as financial wellness books, blogs, video, interactive tools, and much more.





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