

We help your organization thrive

In running your nonprofit or business, managing your assets well is top of mind. To help you pursue this goal, we bring you peace of mind in managing people and money. You receive our professional services and trusted expertise to:

- **Strengthen your financial sustainability** to meet your long-term goals and mission.
- **Align your employees' financial well-being** with your organization's financial well-being.

What is Everence® Financial?

Founded in 1945 in a faith-based tradition, Everence serves individuals, organizations and congregations with values-based financial services. Through a national team of advisors, Everence offers banking, insurance and financial services with community benefits and education.

Client profile

Spring Haven provides compassionate mental health counseling and psychiatric care to people in north-central Ohio. Everence supports Spring Haven with an employee retirement plan so its employees can be more confident about their retirement and focus on helping the people they serve.



\$3.3 billion
of assets under
management

95 Financial
advisors and
representatives
nationwide



Everence®

National organizational representatives



Bill Hartman
Vice President, Organization and Congregation Services



George Finney
Director, Everence Retirement Services



Matt Gehman
Vice President, Lending



Bill Parson
Director, Group Health Sales

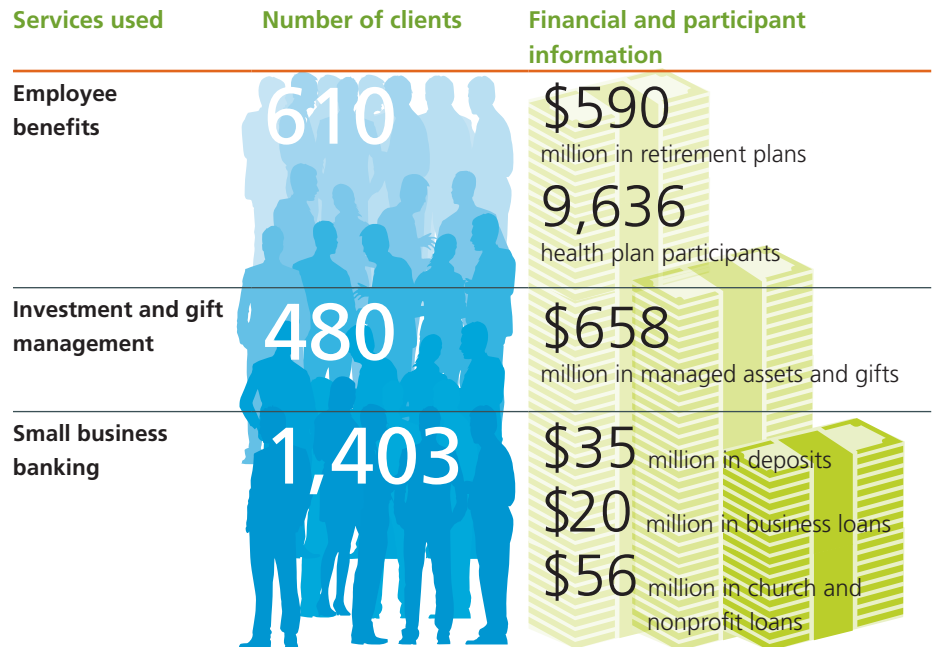


Ron Peconge
Director, Group Health Sales



Maria Wogoman
Director, GroupCare Operations

Snapshot of our client relationships



How we can help your organization

- Employee benefits
- Individual financial services for leaders and employees
- Asset and gift management
- Small-business banking and lending

Find a financial partner

Join other organizations that turn to Everence for a full range of financial services. Work with a partner who respects your values.

Contact your Everence Financial Advisor or reach us at:

(800) 494-6622

everence.com/organizations

organizations@everence.com

