

SERVANT SOLUTIONS NEWSLETTER

JUNE 2026



Servant Solutions
YOUR RETIREMENT & FINANCIAL PLANNING PARTNER



STAYING GROUNDED IN WHAT MATTERS MOST

BY REV. NABIL SAFI, VICE PRESIDENT
& CHIEF OPERATING OFFICER

Seasons of change have a way of testing what we truly believe about leadership. When decisions become more complex and the pace increases, the question is not simply what should we do next, but what are we anchored to?

In moments like these, leadership is revealed. Not in statements or intentions, but in the quiet, consistent choices made day by day.

At Servant Solutions, we believe those choices must be rooted in God-Centered Integrity. This kind of integrity is not reactive. It is formed long before the pressure comes. It shapes how we listen, how we decide, and how we care for the people entrusted to us.

It means maintaining a strong moral compass in every decision and relationship. It means creating an environment where choices are made thoughtfully and collaboratively, where every voice is heard, and where we are intentionally listening for God's voice above all. We strive to remember that integrity is not just about outcomes. It is about how decisions are made and the spirit in which they are carried out.

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Rev. Jim O'Bold

A WORD FROM OUR PRESIDENT

A FRESH LOOK FOR A TIMELESS MISSION

I'm excited to share something new with you in this newsletter: a refreshed Servant Solutions logo and tagline.

Whenever an organization updates its visual identity, there's always a question that comes to mind: "What's changing?"

In our case, the answer is simple. Our look is evolving, but our mission remains the same.

I was here in 2012 when we transitioned from Board of Pensions to Servant Solutions and introduced the logo many of you have

come to know. I've always been fond of that design, particularly the circular logo mark.

So, when our team started talking about a logo refinement, let's just say I needed a little convincing.

My musical tastes still lean heavily toward 1970s and 1980s yacht rock, and I've never been one to change something simply for the sake of change. Fortunately, our team wasn't interested in that either. They found a way to honor our history while preparing for the future.

You'll notice we retained the circular logo mark. The three segments of our logo reflect the seasons of life and ministry we all experience. While those seasons may differ from person to person, the calm center (the eye of the storm) represents the peace of mind that comes from wise planning, faithful stewardship, and trust in God's provision.

Peace of mind is at the heart of what we strive to provide every day. Whether you're just beginning your career, raising a family, preparing for retirement, or already enjoying it, our goal is to help you navigate each season

(and the inevitable storms that come with them) with confidence.

You'll also notice greater emphasis on the word Servant. That was intentional. We believe our calling is not simply to administer retirement plans or provide financial guidance. We are here to Serve Those Who Serve, and privileged

to serve His Servants with humility, wisdom, and care.

Along with the refined, modernized logo, you'll begin seeing a new tagline: Well Planned. Well Done. Those words reflect both our commitment to helping you prepare wisely for the future and our desire to one day hear the words found in **Matthew 25:23: "Well**

done, good and faithful servant."

This refreshed identity arrives during an exciting season for Servant Solutions. God continues to open doors through new partnerships, organizational growth, and opportunities to serve more ministry leaders than ever before. While much around us continues to evolve, the foundation beneath our work remains unchanged.

We remain committed to serving those who serve (*our mission statement*) and improving financial security for servants of the church (*our vision statement*). Our prayer for you is to plan well, producing the peace of mind that leads to hearing "well done" at the end of your journey.

Over the coming months, you'll see this new logo appear across our communications, website, and materials. We hope you'll come to appreciate it as much as we do.

Thank you for allowing us to be part of your journey, and a special thank you for engaging in ours.



WHAT MATTERS MOST,

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A complete set of health care documents is an invaluable asset to your estate plan. It can allow your loved ones to manage your finances (and your care) if the day should come that you cannot. Servant Solutions is able to help you get started through a free service provided by our recordkeeping partner, Principal Financial Group. This package of planning documents is available to you at no additional cost and can be found at servantsolutions.org/estate-planning-documents.

As Christians, we all believe that integrity is deeply connected to how we treat others. We are called to remove barriers by considering others before ourselves. In every interaction, our goal is that others would see the Father before they see us. That kind of Christlike posture builds relationships marked by grace, dignity, and hope.

As leaders navigate competing priorities, a few simple practices can help keep what matters most in focus:

- *Pause before deciding and invite God into the process, not just the outcome*
- *Create space for input, especially from voices that may not always speak first*
- *Address concerns early to build trust rather than avoid tension*
- *Choose people over process when the two are in conflict*
- *Lead with humility, remembering the role is stewardship, not ownership*

Seasons of change will always bring uncertainty. They stretch us, refine us, and often reveal where we are most reliant on our own understanding rather than on God.

We are experiencing that here at Servant Solutions in this current season. And while change can feel demanding, it is also an invitation to slow down, listen more closely, and return again to what matters most.

When leaders remain grounded in integrity, people feel it. Trust grows. Clarity follows. And even in the midst of change, there is a steady sense of direction. That is the kind of foundation we continue to pursue. And may God strengthen you in your leadership: one decision, one conversation, and one act of leadership at a time.



Rev. Nabil Safi

ONE FORM THAT MAKES A BIG DIFFERENCE

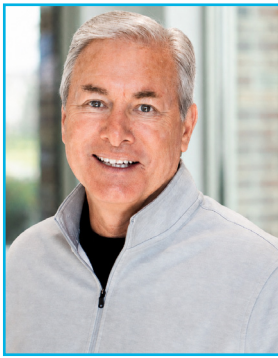
A beneficiary form is a document that allows retirement plan members to decide who will receive the funds in their account after their death. For participants in a church retirement plan such as a 403(b), this form is especially important because it puts members in control of what happens to the retirement savings they have worked hard to build. By completing a beneficiary form, members clearly direct the plan provider on who should receive their account balance.

Many people assume their will determines where retirement funds go, but retirement accounts are distributed according to the beneficiary form on file with the plan provider. This makes the form one of the most important documents connected to a retirement account.

If a beneficiary form is missing or outdated, it can create confusion and delays for loved ones during an already difficult time. Reviewing and updating the form

after major life events helps ensure your wishes remain clear and your retirement savings support the people you care about most. If you experience a major life event such as a change in marital status, the birth of a child or are uncertain if you have a beneficiary form on file, please contact us so we can help you review and update your beneficiary information.





CAN I COUNT ON SOCIAL SECURITY PAYMENTS OVER THE NEXT THIRTY YEARS?

DR. JERRY FOX, CFP®, DIRECTOR OF FINANCIAL PLANNING

I'm at that stage of life when my closest friends (*many of them Servant Solutions members*) are inviting me to their retirement parties.

Dr. Jerry Fox, CFP® Wasn't it just the other day when we were celebrating our college graduation and attending each other's weddings?

As the "what are you doing these days?" conversation reveals my role as Director of Financial Planning for a retirement plan, they all ask the same question: "Can I really count on Social Security to be there for me over the next thirty years?"

It is an understandable concern. Headlines frequently warn about the future of Social Security, trust fund shortfalls, and political disagreements in Washington. For ministers, teachers, and other Christian servants who have faithfully stewarded the Lord's provision over the years, understanding the role Social Security should play in retirement income is essential.

The short answer is yes. Most retirees can reasonably expect Social Security benefits to continue for decades, though probably not in their current form or amount.

Social Security does face long-term financial challenges. Americans are living longer, having fewer children, and fewer workers are supporting a growing number of retirees. While current projections show

the trust funds could eventually be depleted without Congressional action, that does not mean benefits will disappear. Payroll taxes would continue funding much of the program, and Congress has historically acted before a crisis reached that point.

The better question is not whether Social Security will exist, but how much you should depend on it. At Servant Solutions, we view Social Security as one part of a complete retirement income plan. A well-funded 403(b), along with personal savings and other assets, provides flexibility to respond to inflation, unexpected expenses, charitable giving, and opportunities to continue serving in retirement.

Ministers should also understand their individual Social Security eligibility. Some clergy opted out of Social Security, yet may still qualify for spousal benefits or benefits earned through other employment. Completing a free Financial Roadmap with our financial wellness team can help you understand your options.

As followers of Christ, retirement planning involves both prudence and trust. Scripture calls us to prepare wisely while remembering that our ultimate security rests not in government programs or investment accounts, but in the Lord.

As you approach retirement, view Social Security as a valuable and likely dependable source of income, but not your only one. Coordinating Social Security with your 403(b) and other retirement resources can provide a strong foundation for a financially secure retirement.

HONORED TO BE RECOGNIZED

Servant Solutions was honored to be named a finalist in the multiple employer category for the 2026 **PLANSPONSOR Plan Sponsor of the Year Award**.

The annual awards program recognizes retirement plan sponsors that demonstrate an exceptional commitment to participants' financial well-being and retirement success. This year, 56 finalists were selected from 193 nominations across 14 categories.

Being recognized alongside organizations such as Alphabet (Google), Toyota Motor North America, and Green Mountain Power was both humbling and encouraging. While we did not receive the award, the

recognition affirmed that our commitment to serving others is making a meaningful impact.

The **PLANSPONSOR** National Conference in Nashville also gave our leadership team the opportunity to connect with fellow plan sponsors and our partners at Principal.

We are grateful for this recognition and came home even more committed and passionate about our calling.

