

# GUIDESTONE<sup>®</sup> MANAGED ACCOUNTS

**A personalized investment service that helps you plan for success in retirement**

## WHY IT MATTERS

At GuideStone, our mission is to enhance the financial security and resilience for those who serve the Lord.

For you and for us, financial security and resilience are not the ultimate goal — it's a means to an end. It gives you the freedom to answer God's calling, provide for your family and bless the next generation of believers. Our vision is that every servant of Christ finishes well.<sup>™</sup>

With that in mind, we proudly provide tailored advisory services focused on achieving each member's financial goals.

We understand what it means to be good stewards because, like you, our faith informs everything we do. Our advisors serve in their churches, various ministries and on mission trips. You can trust us to act with integrity, incorporating our faith into every decision.



## PERSONALIZED INVESTMENT MANAGEMENT

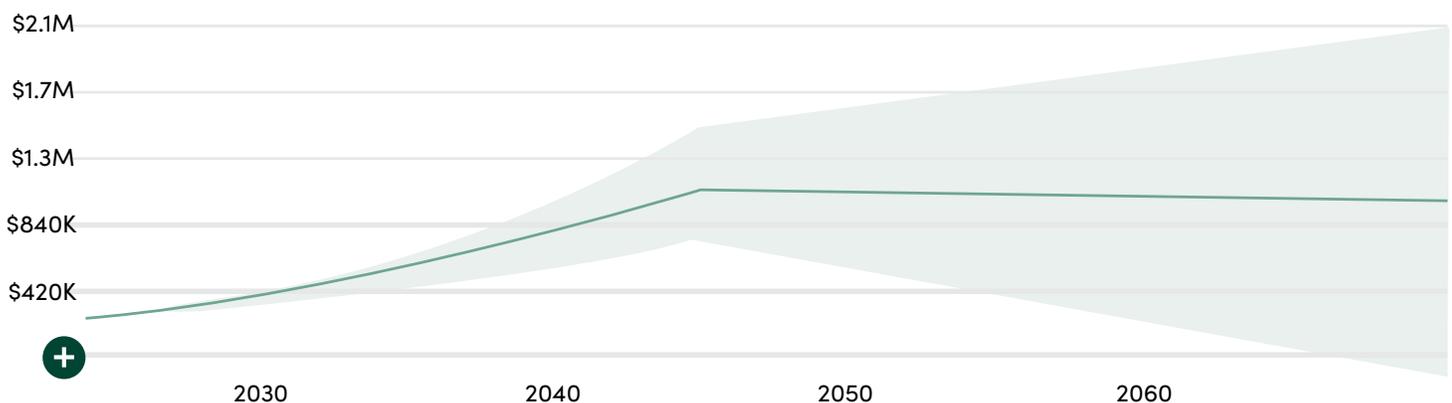
At GuideStone, we focus on making faith-based investments:

- We don't invest in companies known for products and services that conflict with Christian values.
- We advocate for Christ-honoring practices within the companies we invest in.
- We offer the opportunity to invest in companies and organizations working to make an impact for the Kingdom.

With GuideStone Managed Accounts™, an advisor will build an investment strategy aligned with your goals, time horizon and risk tolerance. Our team will proactively manage your portfolio and connect with you annually to help ensure your investments remain on track with your financial plan.

## RETIREMENT ROADMAP

We will forecast the possible outcomes of your current financial plan to identify potential gaps or opportunities, then propose an alternative roadmap with improvements to accomplish your goals. When creating your plan, we will evaluate your budget, compensation, Social Security and other assets and benefits.



*The tables have been prepared for purposes of illustration only, are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results.*

## WORKING WITH OUR TEAM



### Annual Review

Every year, we'll contact you to set up a review to help ensure that your account is on track. We will answer all your questions and adjust your plan as needed.



### Access to the GuideStone Advisors® Team

Use our dedicated advisor team calendar, phone number and email address to connect with our team.



### Advisor Insights Newsletters

Every quarter, our team will send you an email newsletter detailing the state of the market and seasonal financial tips.

## READY TO GET STARTED?

Take the next step toward increasing your financial confidence by emailing

[\*\*\*ManagedAccounts@GuideStone.org\*\*\*](mailto:ManagedAccounts@GuideStone.org)

to set up an appointment.

GuideStone Wealth Management™ and GuideStone Managed Accounts services are fee-based services available to investors in personal investment accounts and non-ERISA retirement accounts offered by a GuideStone affiliate. An advisory fee for the service is assessed quarterly and based on total assets in the account. These fees are in addition to the underlying mutual fund fees. Advisory services are offered through GuideStone Advisors, an SEC Registered Investment Adviser. GuideStone Advisors is a controlled affiliate of GuideStone Financial Resources®. For more information about the firm, products and services, please review the [GuideStone Affiliate Form CRS](#).

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