

Everence

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L to R: Jen McCoy, client relationship representative; Amanda Rock*, CFP®, financial adviser; Elisabeth Drake, client services representative; Clair Sauder*, CFP®, AIF, MBA, financial adviser; Melissa Gehman, client services representative. PHOTO | ELDON ZIMMERMAN

Everence achieves milestones with help from faith community

Everence® provides financial products and services, but it does quite a bit more than just that. It offers people a chance to belong — to be part of an organization that fosters community and mutual aid.

Everence started more than 70 years ago to help people of faith share their resources, first by offering loans to church service volunteers. Founded by the Mennonite Church in 1945, Everence grew out of a tradition of church communities putting their faith into action by sharing resources.

Everence products and services are open to everyone interested in practicing stewardship that aligns with our founding values.

Many of its members belong to denominations that have historic roots or relationships with the Anabaptist faith community. A growing number of its members hold Christian values and aren't necessarily part of a denomination.

Helping people integrate their faith and values into their financial decisions is the Everence mission.

Everence, based in Goshen, Indiana, employs about 50 people in its Lancaster, Pennsylvania, core market. Local adviser offices and Everence Federal Credit Union branches are in Mount Joy and Ephrata, in addition to Lancaster.

“We want to help people feel more comfortable about managing their finances and more confident about where they're headed,” said Financial Adviser Clair Sauder, CFP®, AIF®, MBA. “At the same time, we're helping them maximize their generosity toward the charitable organizations they care deeply about.”

Financial Adviser Amanda Rock, CFP®, said, “My passion is to help people create and follow a financial plan that helps them live in ways they feel called to live, including supporting their churches. And we help them feel at ease with the

foundation they're building for their families' financial future.”

Everence members are eligible for college scholarships and free debt and credit counseling. Because part of Everence is a fraternal benefit society, certain funds are dedicated to helping people in communities where Everence operates.

An Everence credit card program known as Rebate for Missions contributed more than \$400,000 to local and international missions organizations.

That program evolved into the new MyNeighbor credit card, which gives people the chance to choose which charity will receive donations from Everence generated through each transaction.

Earlier this year, Everence surpassed the \$3 billion mark in assets it manages on behalf of individuals, congregations and organizations.

Everence celebrated another milestone of \$1.25



Everence®



CLOCKWISE FROM TOP LEFT: L to R: Doug Umble, managing director; Sherri Mellinger, administrative assistant to Doug Umble; Lisa McHenry, client relationship representative; Jay Kready, financial adviser - PHOTO | ELDON ZIMMERMAN. L to R: John Martin, business development officer; Natalya Huehnergath, branch manager; Vic Richard, CLBB, business development officer - SUBMITTED PHOTO. L to R: Eric Groff*, financial adviser; Jamie Detweiler, CFP®, financial adviser; Amanda Rock*, CFP®, financial adviser; Tim Jantz*, financial adviser; Matt Allgyer*, financial adviser - SUBMITTED PHOTO.

billion in charitable giving through the organization.

Holding the \$3 billion in assets beside the \$1.25 billion in gifts “demonstrates just how much generosity and stewardship matter to our faith community,” said Managing Director C. Douglas Umble.

The \$1.25 billion represents the amount shared throughout the history of Everence. It consists mainly of charitable gifts that people gave away through Everence Charitable Services, but also includes Everence Sharing Fund grants and Rebate for Missions donations.

Everence serves more than 50,000 members from its corporate office and more than a dozen other locations across the United States.

Its representatives help members in their stewardship journeys through a holistic approach that considers their gifts of time, talent, money, relationships and health. Members can then develop

a strategy that enables them to live responsibly, discover and plan for God’s purpose, prepare for the future and give generously.

Everence practices socially responsible investing through practices of social screening, shareholder advocacy and community development investments.

Insurance products and services include Medicare supplement, life and long-term care insurance.

Everence is the common name for entities that share the same mission, such as Everence Financial; Everence Federal Credit Union; Everence Financial Advisors; Praxis Mutual Funds*; Everence Trust Company; Everence Association Inc., a fraternal benefit society; Everence Capital Management Inc.; and Everence Securities Inc. Mennonite Foundation is an affiliate of Everence.

One of the main strategic objectives at Everence

is to be an employer of choice, with a workforce that reflects the growing diversity of the communities it serves. That effort includes recruiting, hiring and training programs designed to lead to a more multi-generational, multi-cultural and multi-talented workforce.

To meet our entire team and learn more about us, visit Everence.com/Lancaster.

**Advisory services offered through Everence Trust Company and ProEquities Inc., Registered Investment Advisors. Securities offered through ProEquities Inc., member FINRA and SIPC. Investments are not NCUA insured, may involve loss of principal and have no credit union guarantee. Everence entities are independent from ProEquities Inc. Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP® in the U.S. Praxis Mutual Funds distributed through BHIL Distributors Inc. Member FINRA.*