

# Invested in your future

An introduction to RPB



RPB provides employees of Reform Movement congregations and organizations with plans and programs to help them achieve a comfortable and dignified retirement.

**OUR OFFERINGS INCLUDE:**

- 403(b) defined contribution retirement plan
- Non-qualified deferred compensation plan (Rabbi Trust)
- Term life insurance
- Long term disability insurance
- Retirement contribution insurance
- Loans from 403(b) accounts
- Financial wellness support, education, and tools
- A socially responsible fund based on the values of the Reform Jewish Movement for both participant and congregational investing

**RPB works only and always in the best interests of our participants and employers.** We have no shareholders to please, no revenue goals to meet, and no products to push.

# Caring for those who care for all of us

Working for a religious organization is a labor of love. Those who work tirelessly to support their communities and give so much of themselves deserve a retirement plan that's as dedicated as they are. That's why the Reform Movement created the Reform Pension Board in 1944.

Today, RPB provides a defined contribution retirement plan and life and disability insurance programs tailored to the financial needs—and shared values—of those working in the Reform Movement. Our investment strategy and selection of high-quality funds are guided by today's best practices in retirement planning.

*“RPB is a good expression of who we are as a like-minded community and how we care for each other.”*

RABBI EMERITUS ALAN FREEDMAN  
Temple Beth Shalom, Austin, TX,  
RPB plan participant since 2003



# Benefits that are as dedicated as you are

RPB understands that Reform Movement organizations need to attract and retain the best and the brightest to ensure the future of the movement. That's why we're proud to offer some benefits that other retirement plan providers cannot.

- **A range of investment tiers with fund choices** to meet every participant's needs.
  - Plan participants who don't have the experience or desire to make regular investment decisions can select from a series of **target date funds**, which are diversified funds that gradually and automatically adjust the mix of stocks and bonds as participants age to help manage risk.
  - For those who want to customize their own portfolio, our **self-directed funds** in Tier 2 include a mix of stock and bond funds from a range of leading fund managers.
  - Tier 3, our **socially responsible funds**, is for participants who want to build a better world while they are investing for their retirement.
- **Another way to save.** RPB offers a non-qualified deferred compensation plan ("Rabbi Trust") to accommodate participants with employer contributions that exceed the annual IRS contribution limit.
- **Parsonage in retirement for clergy.** Because funds distributed by RPB qualify for a parsonage tax benefit—regardless of which Reform Movement employer contributed the money—retired clergy can use allowable housing expenses to limit their taxable income.
- **Unique service and care.** We take great pride in providing participants with education and personalized support through one-on-one customer service, free retirement planning and financial coaching, financial wellness seminars, and regular market and plan update webinars.
- **Collaboration with financial advisors.** RPB shares a common goal with advisors: our clients' best interests. That's why we enthusiastically partner with our participants' financial advisors to help them secure their financial future.

*"I enjoyed my career more because I knew I could retire comfortably. As I got closer to retiring, that peace of mind mattered even more. Part of what made my career feel 'successful' was having those benefits through RPB."*

RABBI MARLA FELDMAN  
Former Executive Director, Women of Reform Judaism, New York,  
RPB plan participant since 1985

LEARN ABOUT OUR

## Reform Jewish Values Stock Fund

For plan participants and congregations who want to take their socially responsible investing to the next level, RPB offers a low-cost global stock fund guided by the resolutions of the CCAR, URJ, and CSA.



# Above all, our shared values guide our investments.



Our board, investment committee, and staff all take RPB's fiduciary duty seriously. Our financial stewardship is based on a rigorous investment process and philosophy that aligns with Jewish values.

These values of *tikkun olam* and *tzedek*—as expressed in our Jewish Values Investing policy—have informed our decision-making process since 1997. This approach enables our participants to truly live their Jewish values while preparing for the retirement they deserve.

Learn more at [rpb.org/JVI](https://rpb.org/JVI).

## Support and guidance for the *whole* financial you.

We offer three ways to connect directly with experts for support with anything money related—not just the big things like retirement. It's one-on-one, personalized, free of charge, and always kept in complete confidence:

- **Fidelity Financial Coaches** for everyday financial wellness
- **Fidelity Retirement Planners** for retirement planning, saving, and investing
- **RPB Participant Services** for RPB plan and account support

Learn more at [rpb.org/one-on-one-support](https://rpb.org/one-on-one-support).





Reform Pension Board  
122 East 42nd Street  
Suite 2800  
New York, NY 10168

[rpb.org](http://rpb.org)

If you have any questions,  
we're here to help.

[askus@rpb.org](mailto:askus@rpb.org)  
212.681.1818

March 2026