



Wespath Competitive Landscape Analysis

Marketing & Communications

Trinity Maze

Summer 2026 Internship Project



Purpose

Understand Wespath's competitive landscape through a Marketing & Communications lens.

Landscape

- Identify key organizations and market segments.

Positioning

- Compare messaging, services and branding.

Insights

- Identify key observations and opportunities.

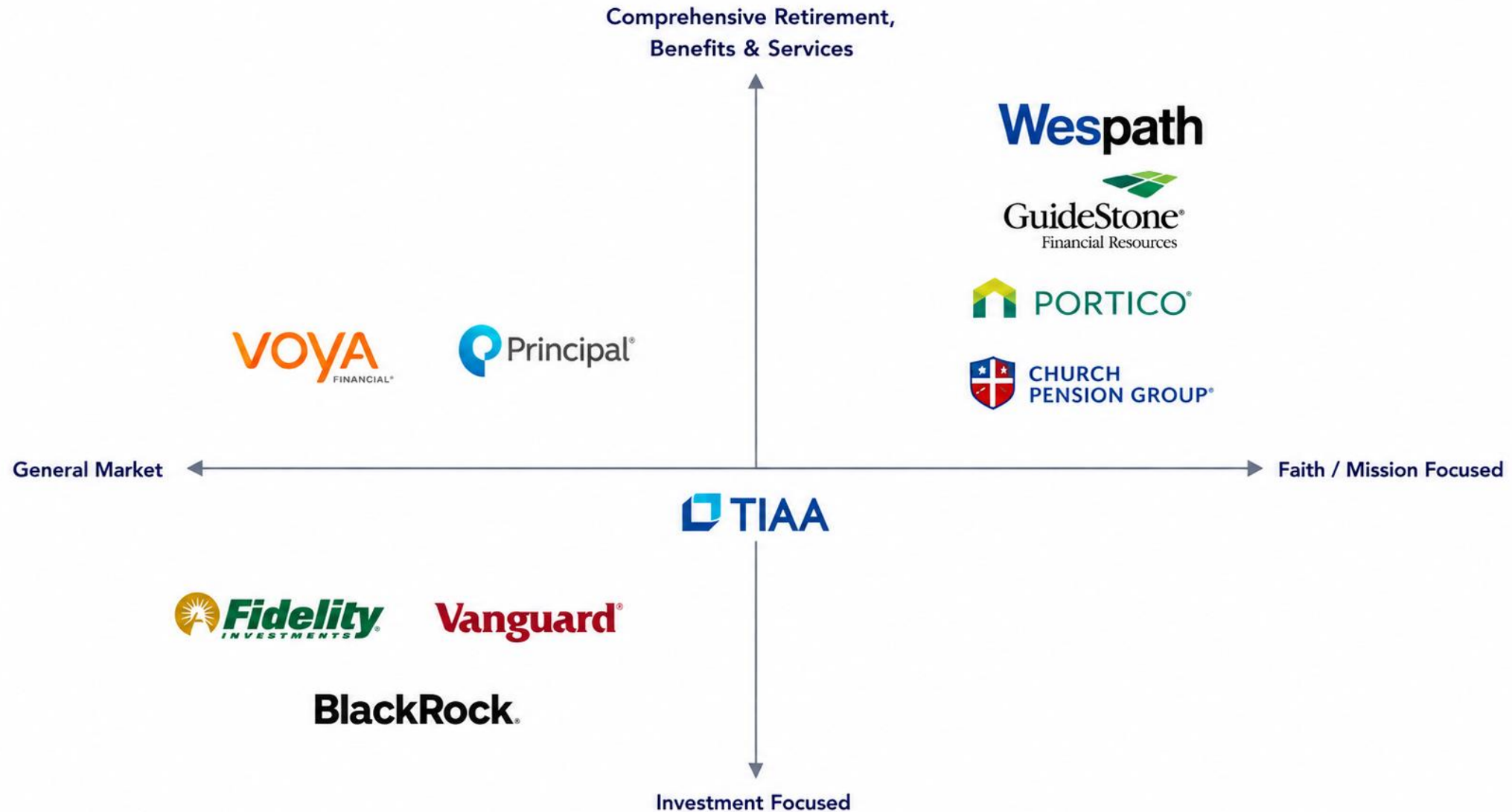
Research includes competitor positioning, messaging, websites, thought leadership and social media.

Competitive Landscape

Competitors were grouped based on how they compare to Wespath's core business:

Segment 1	Segment 2	Segment 3
Faith-based Benefits	Benefits & Retirements	Investment Firms
 GuideStone [®]	 TIAA	 Fidelity [®] INVESTMENTS
 Benefit Services A Ministry of the ELCA	 VOYA FINANCIAL [™]	BlackRock [®]
 CHURCH PENSION GROUP	 Principal SM	Vanguard [®]

Competitive Positioning



Segment 1: Faith-Based Organizations

Representative Organization: GuideStone



- Founded in 1948
- Headquartered in Dallas, Texas
- Serves Christian churches, ministries, & non profit organizations

Why GuideStone?

- ✓ Closest comparison to Wespath
- ✓ Offers retirement, health, investment and insurance solutions
- ✓ Strong faith-based mission & values-driven investing
- ✓ Serves ministries beyond its Southern Baptist roots



GuideStone® Messaging

Key Themes

- Mission before products
- Faith-centered language
- Consistent brand voice

Examples

- "Serving those who serve the Lord."
- "Start well. Stay well. Finish well."



GuideStone Website

The Kingdom Impact Report is here! Learn what faith-based investing means at GuideStone® and see the impact it can have for God's Kingdom. [Read now.](#)



Individual ▾

Organization ▾

Resources ▾

About Us ▾

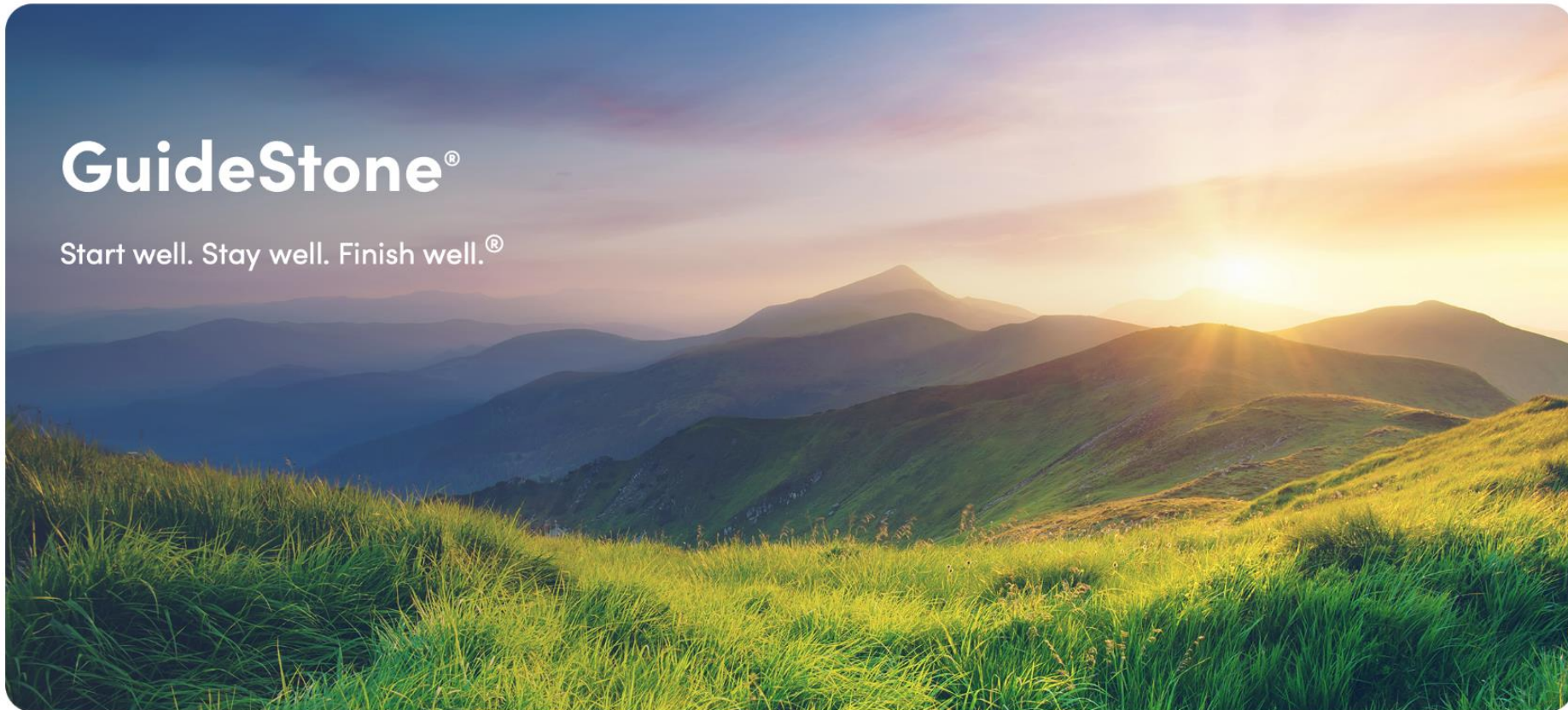
Mission:Dignity ▾

🔍 | Sign in ▾

Get Started

GuideStone®

Start well. Stay well. Finish well.®



GuideStone Website

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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.

Get to Know GuideStone

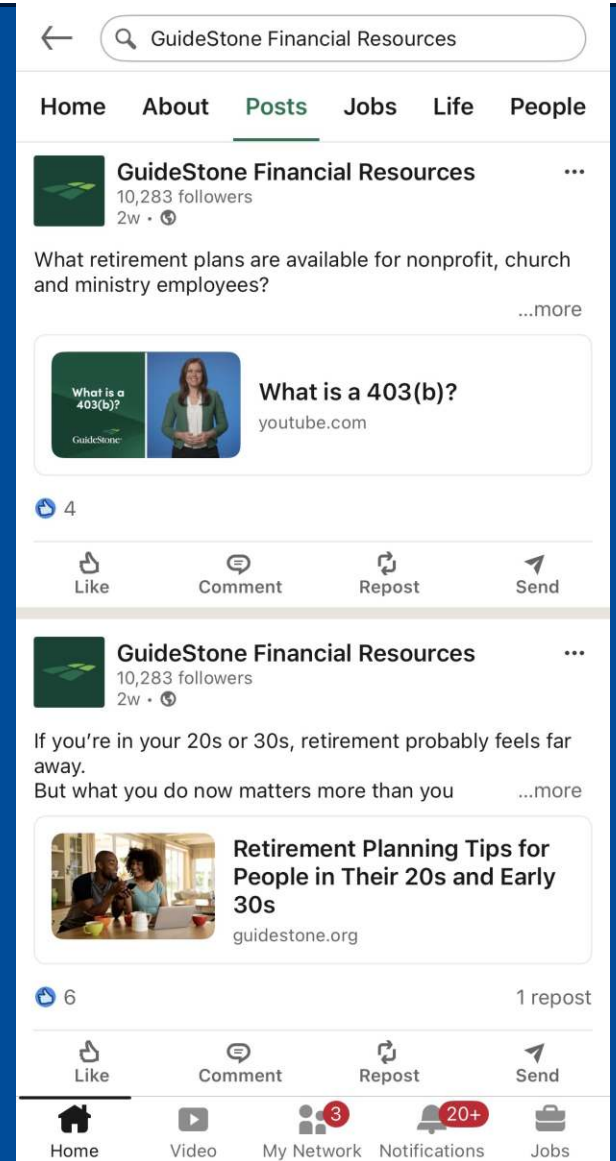
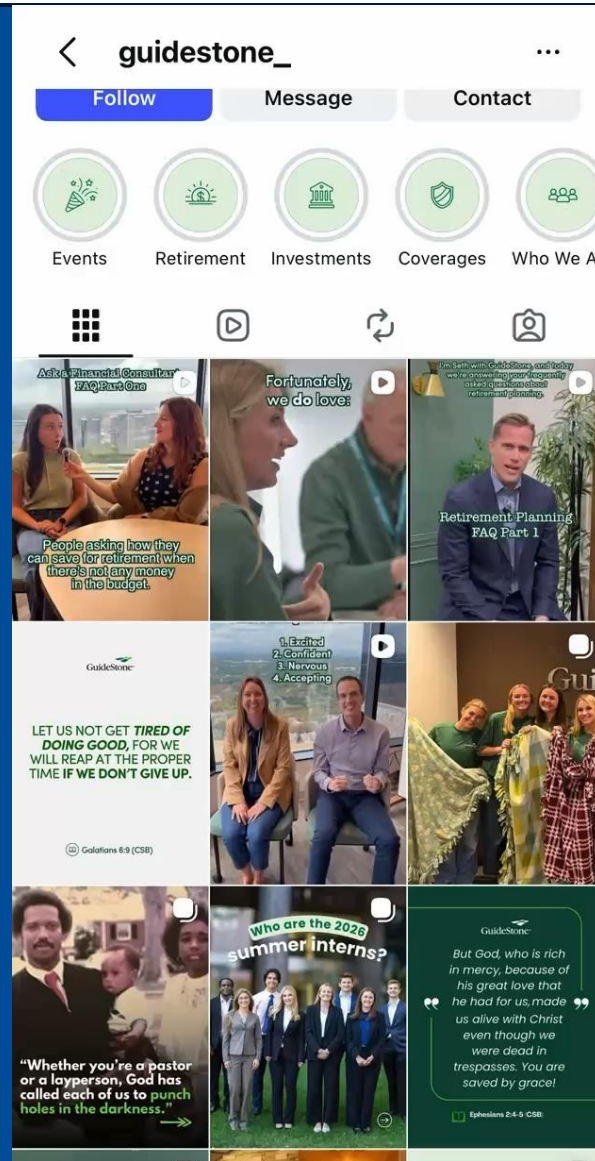
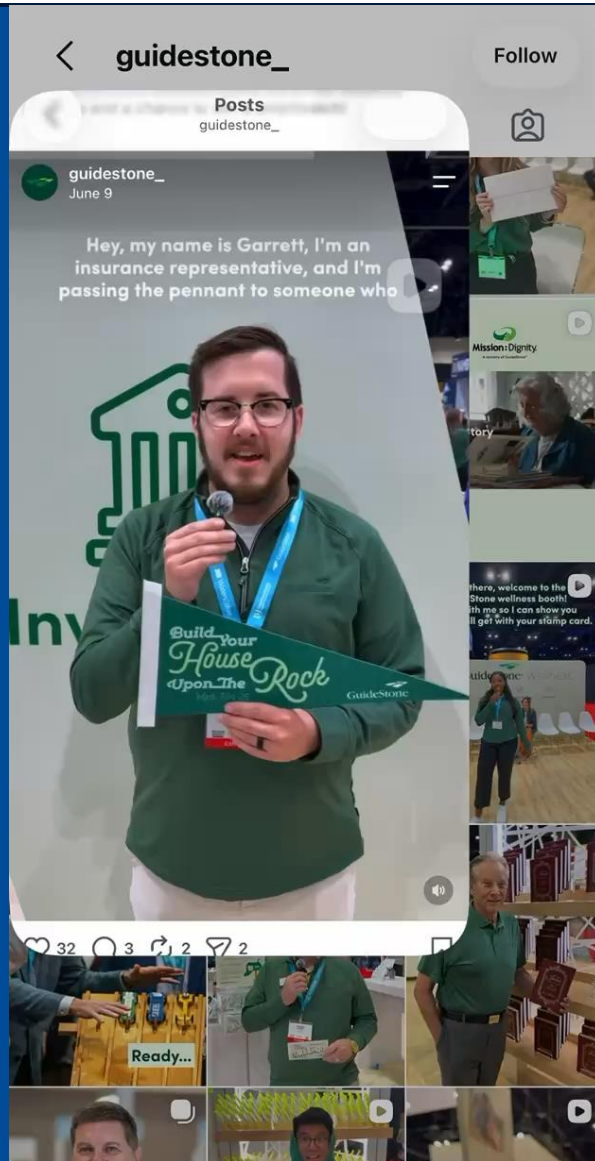


How can we help you today?

GuideStone provides churches, ministries, faith-aligned institutions and Christian households with financial solutions that support our shared biblical values — equipping believers to lead resilient lives and advance the Kingdom of God. Our goal for you? Start well. Stay well. Finish well.®

The GuideStone website
establishes the brand
before explaining the
business.

GuideStone® Social Media



**Contemporary content
strengthens—not distracts
—from their mission.**

GuideStone Thought Leadership

3

guidestone.org

What is your life stage?

Find valuable resources and educational tools aligned with each season of life to help you start well, stay well and finish well.

Select your life stage below for relevant resources.

START WELL

STAY WELL

FINISH WELL



Start a Career (any age)

For those beginning a career with little or no experience with retirement savings, budgeting, health plans or other types of coverages

Take the right steps early in your career to build a strong foundation and maximize your financial resilience and physical well-being.

Retirement Health and Wellness

BUDGETING 101



SAVING EARLY 101



RETIREMENT SAVINGS 101



MINISTER-SPECIFIC RESOURCES



guidestone.org

Featured Articles

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ARTICLE • 7/26/2026

Two Truths and a Lie About Market Volatility: How to Avoid Emotional Investing in Uncertain Markets

Learn how emotional investing can affect decisions during market volatility. Discover two investing truths, one common myth and strategies for staying focused on long-term goals.



ARTICLE • 7/22/2026

Preventive vs. Diagnostic Care: What's the difference?

Preventive and diagnostic care are covered differently. Discover why knowing the difference may help you save. Plus, see practical examples.



ARTICLE • 7/21/2026

A Gift to Sustain: Bill Swank's Donor Story

William "Bill" Swank grew up in a pastor's home. He later became a pastor himself, serving in churches across the Southwest before joining the Tarrant Baptist Association staff. For Bill, service to others defined his working years. Now, in retirement, he is supporting others who share that same calling.



ARTICLE • 7/21/2026

You Can't Outgive God: Dr. Jim Henry's Donor Story

Dr. Jim Henry remembers the exact moment he first chose to support Mission:Dignity®. As president of the Southern Baptist Convention® (SBC), Jim



ARTICLE • 7/8/2026

Investing for Kids: Five Ways to Support Their Future

Discover options for investing for kids and grandchildren, including 529 plans, custodial investment accounts and



ARTICLE • 6/29/2026

Hidden Costs of Home Ownership

Here are five unexpected costs you need to be ready for after you buy your home.

**Education meets members
where they are in life.**



GuideStone® **Key Takeaways**

Mission First

Every channel reinforces GuideStone's faith-based identity.

Trust Before Products

Brand credibility is established before discussing services.

Audience-Centered Communication

Content is tailored to members' life stages and needs.

Segment 2: Benefits & Retirement Providers

Representative Organization: TIAA



- Founded in 1918
- Headquartered in New York, New York
- Serves higher education, healthcare, research and nonprofit organizations

Why TIAA?

- ✓ Largest organization in this segment
- ✓ Most comparable to Wespath's business model
- ✓ Broad retirement, investment & wellness services
- ✓ Strong benchmark for marketing & communications

TIAA Messaging

Key Themes

- Purpose-driven financial security
- Retirement confidence & long-term planning
- Trusted guidance for mission-driven organizations

Examples

- *“Helping those who help others.”*
- *“Passion for life, meet money for life.”*
- *“Our best performing portfolio is you.”*



TIAA Website

Current site: **Individuals** ▾ **Get help** ▾



Retirement ▾

Wealth Management ▾

About TIAA



Enroll

Open an IRA

Log in

YOUR RETIREMENT OUTLOOK

Retirement planning just got easier

Your online account now features an easy-to-use dashboard, personalized guidance and powerful savings tools—plus a sleek new mobile app experience for planning on the go.

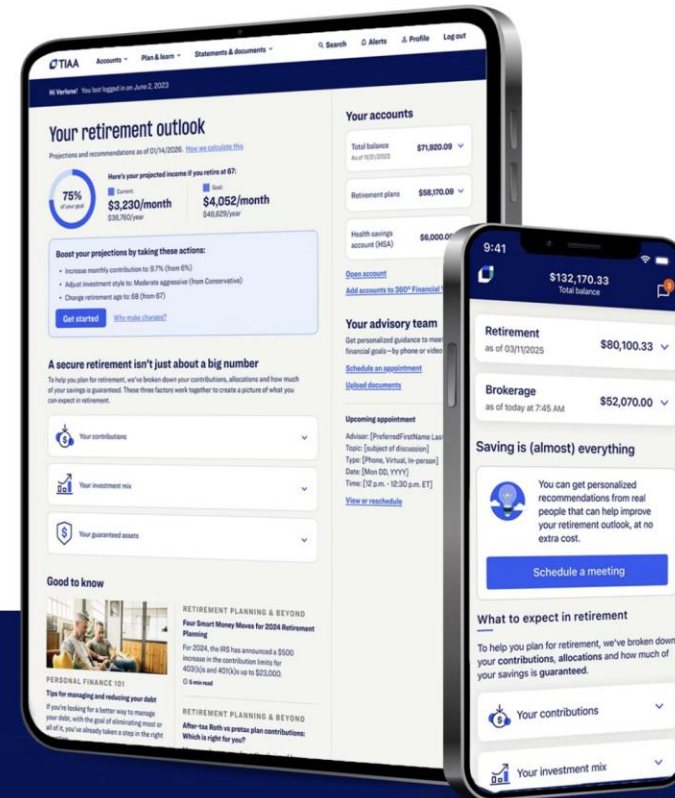
See what's new

Personalized advice

Receive custom insights to help optimize your investment portfolio using our Retirement Journey Planner.

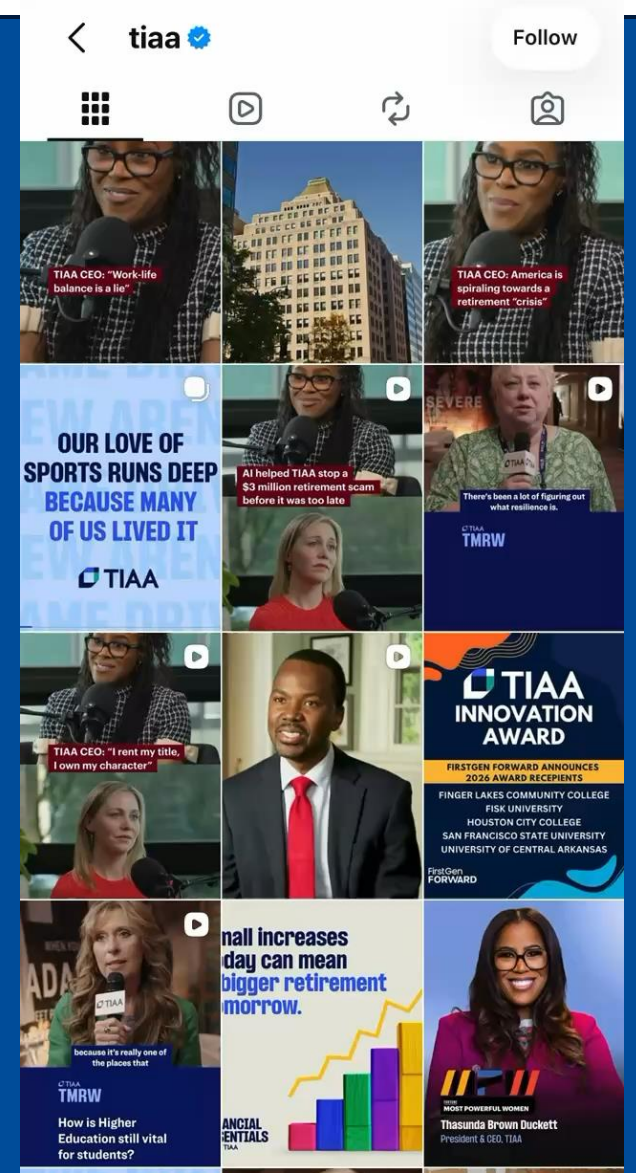
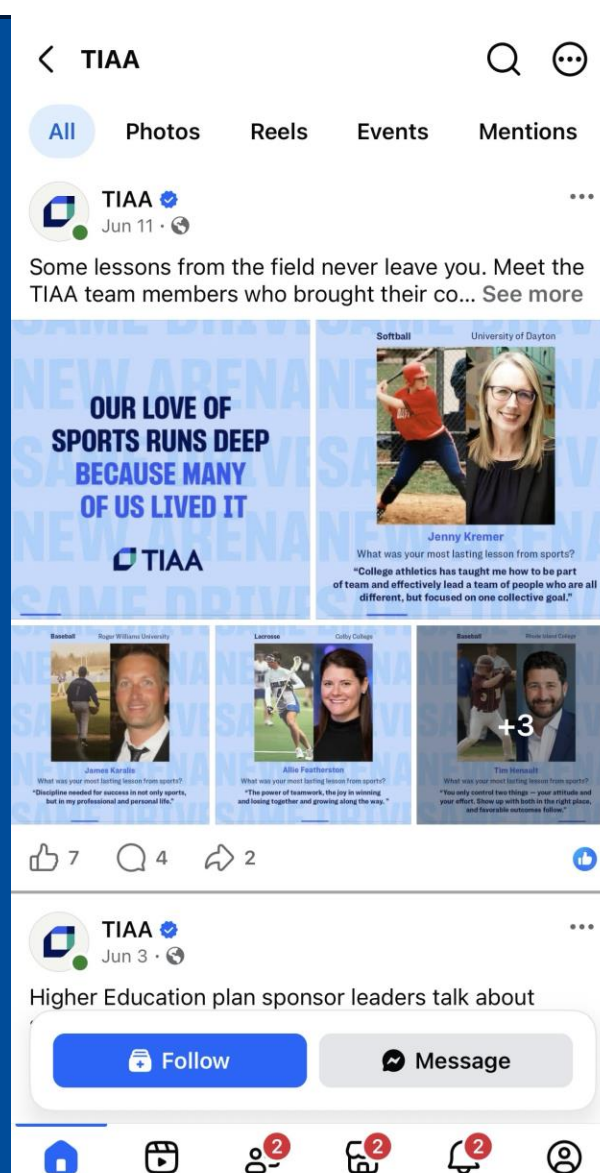
Enroll in your plan

Learn about your plan, set up
your account online and start
saving for retirement right now.



**The user journey begins
with a task—not the brand.**

TIAA Social Media



Partnerships expand the
brand beyond financial
services.

TIAA Thought Leadership

Current site: **Individuals** ▾ **Get help** ▾

 Retirement ▾ Wealth Management ^ About TIAA

Search  **Enroll** **Open an IRA** **Log in**

THOUGHT
Wealth

Financial advice >

Products & services >

Education & resources >

INSIGHTS FROM TIAA

Market perspectives

PERFORMANCE

Investment performance

Daily performance watchlist

Life insurance performance

Personal annuity performance

TOOLS

Find the right IRA for you

Calculate IRA contribution limits

Calculate Roth IRA conversion

All tools and calculators

Feat



**TIAA's thought leadership takes
two forms:**

**Direct educational expertise on
its website and storytelling-driven
narratives on social media.**

TIAA Key Takeaways

Utility First

Members meet a task first, not a brand story.

Brand Beyond Banking

Partnerships extend TIAA past financial services.

Two-Track Thought Leadership

Expertise on the site, storytelling on social.

Segment 3: Investment Firms

Representative Organizations: Fidelity, Vanguard & BlackRock



BlackRock

Vanguard

Common Characteristics

- ✓ Global brand recognition
- ✓ Investment-first messaging
- ✓ Broad consumer audience
- ✓ Scale-driven digital experiences

Segment 3: Marketing & Communications

Shared patterns across Fidelity, Vanguard & BlackRock

Messaging

- Performance
- Expertise
- Financial confidence

Website

- Task-oriented
- Product-focused
- Personalized dashboards

Thought Leadership

- Market insights
- Investing research
- Economic outlooks

Social Media

- Financial education
- Market commentary
- Brand campaigns & sponsorships

Key Takeaways



Fidelity
INVESTMENTS

BlackRock

Vanguard

Scale Over Intimacy

Global recognition lets the product lead the message.

Investment-First Positioning

Performance and expertise carry the brand, not mission.

Education as Engagement

Research and market commentary drive everyday reach.

CROSS-SEGMENT COMPARISON

Each segment builds trust differently.

CATEGORY	SEGMENT 1 Faith-Based Providers	SEGMENT 2 Benefits & Retirement Providers	SEGMENT 3 Investment Firms
PRIMARY FOCUS	Faith, ministry & member care	Retirement planning & financial well-being	Investing, wealth management & financial growth
MESSAGING	Mission-driven & relationship-focused	Purpose-driven & confidence-building	Performance, expertise & financial outcomes
WEBSITE STRATEGY	Brand & mission first	Action-oriented & user-focused	Product- & task-oriented
THOUGHT LEADERSHIP	Life-stage education	Research & financial expertise	Market insights & investment education
SOCIAL MEDIA	Community & ministry storytelling	Leadership, partnerships & storytelling	Financial education, market updates & brand campaigns
OVERALL MARCOM STRATEGY	Build trust through mission	Build trust through expertise & relationships	Build trust through scale, performance & expertise

What This Analysis Reinforced

Mission Is Our Foundation

Wespath's faith-based identity is already a natural differentiator within the marketplace.

Credibility Must Match the Mission

Organizations across every segment reinforce trust through expertise, education and consistent communication.

Consistency Creates Stronger Brands

The strongest organizations deliver a unified message across every touchpoint, from websites to social media.

The Opportunity

Continue strengthening how Wespath communicates its value — not changing what makes it unique.

Opportunities

Leverage Strategic Partnerships

Build conference, church and ministry partnerships into co-created content and speaking engagements.

Highlight More On-Site Experiences

Cover conferences, events, member visits and behind-the-scenes moments to showcase the community.

Expand Video-First Storytelling

Use short-form video for updates, education and event coverage beyond static graphics.

Continue Investing in Educational Content

Extend expertise through life-stage resources, practical guidance and thought leadership.

Leverage Leadership & Employee Voices

Feature staff, leadership and member stories to humanize the organization and strengthen trust.



Thank You

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