

Quadrennial
Benefits
Conference



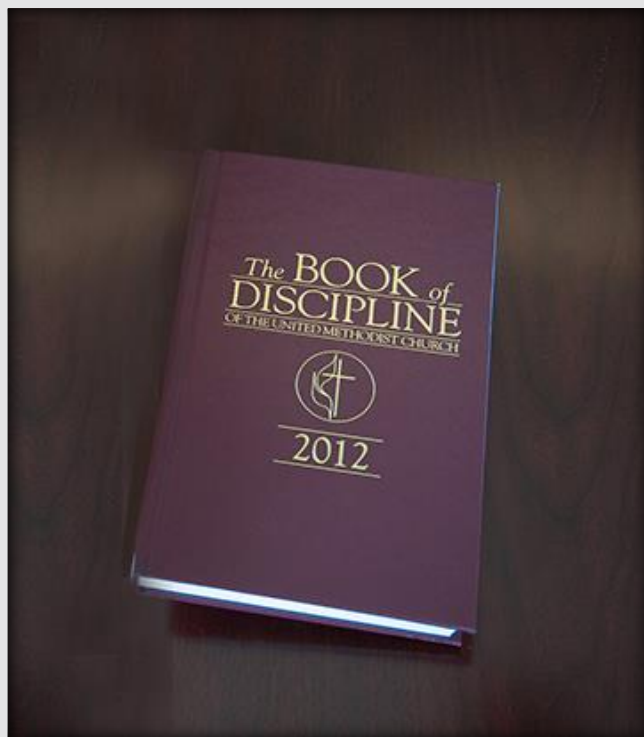
BENEFITS EDUCATORS

Helping Conferences Navigate Participant Education



Wespath
BENEFITS | INVESTMENTS

Book of Discipline ¶358.4



Pre-Retirement Counseling

“...shall offer to all clergy members anticipating retirement preconsultations at least **five years prior to the date of anticipated retirement.** ... to assist the clergy and spouses to plan and to prepare for the adjustments associated with retirement as well as providing guidance and counsel for their return to a new relationship in the local church.”

Need for Financial Education

GBHEM/Wespath Surveys

60% Young Clergy	Have never received personal financial training
70% Young Clergy	Indicated they had not received the training necessary to manage church finances effectively
43%	Indicated feeling—“ <i>Only a little confident</i> ” or “ <i>Not confident</i> ” — in overall management of church finances
37%	Debt of all kinds is a “ <i>consistent source of anxiety</i> ”



The BEs: Benefits Educators



Why Invite a BE?



Experienced professionals to help guide your participants

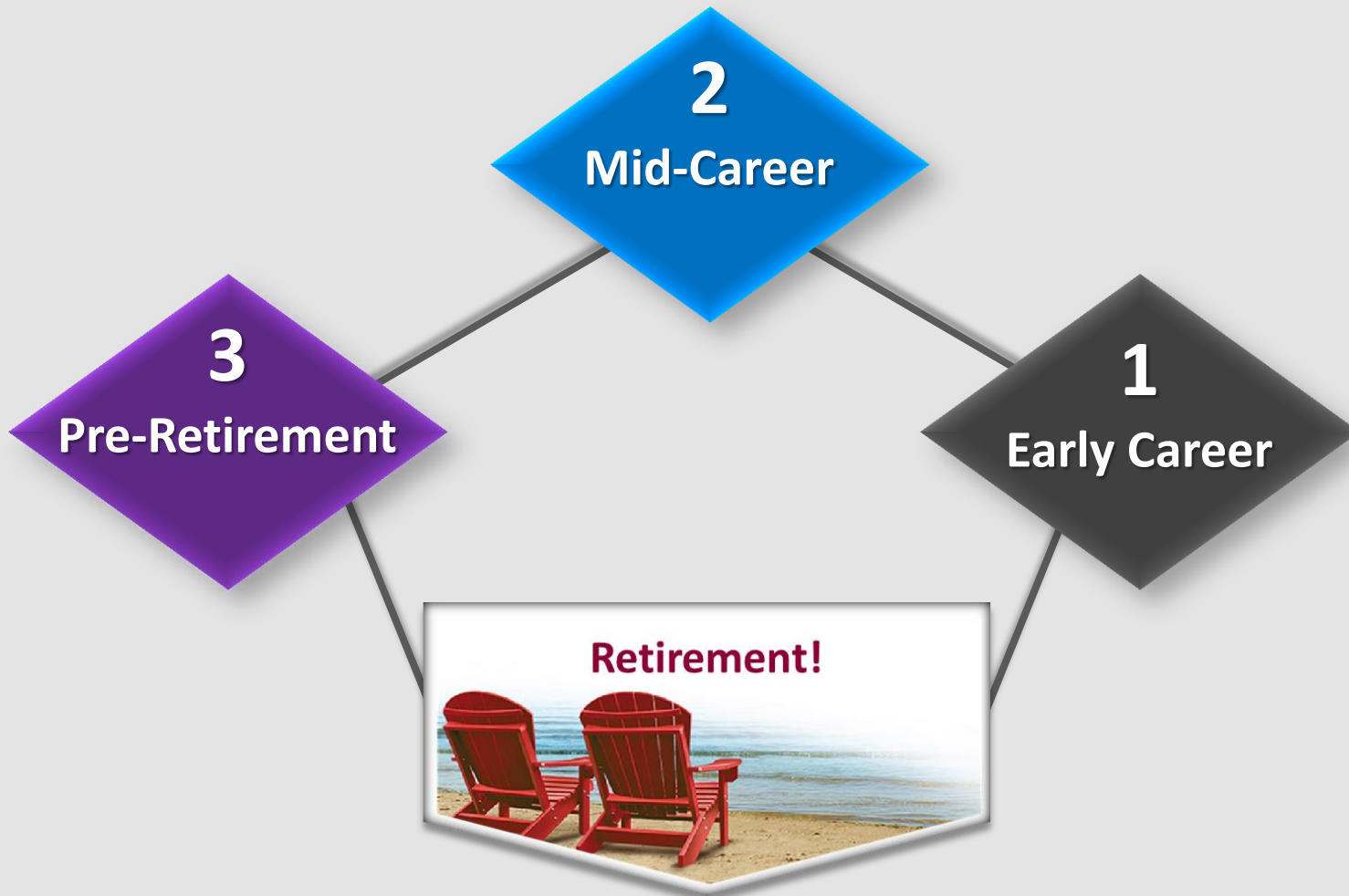
Customized content direct from Wespath

Materials provided for each participant

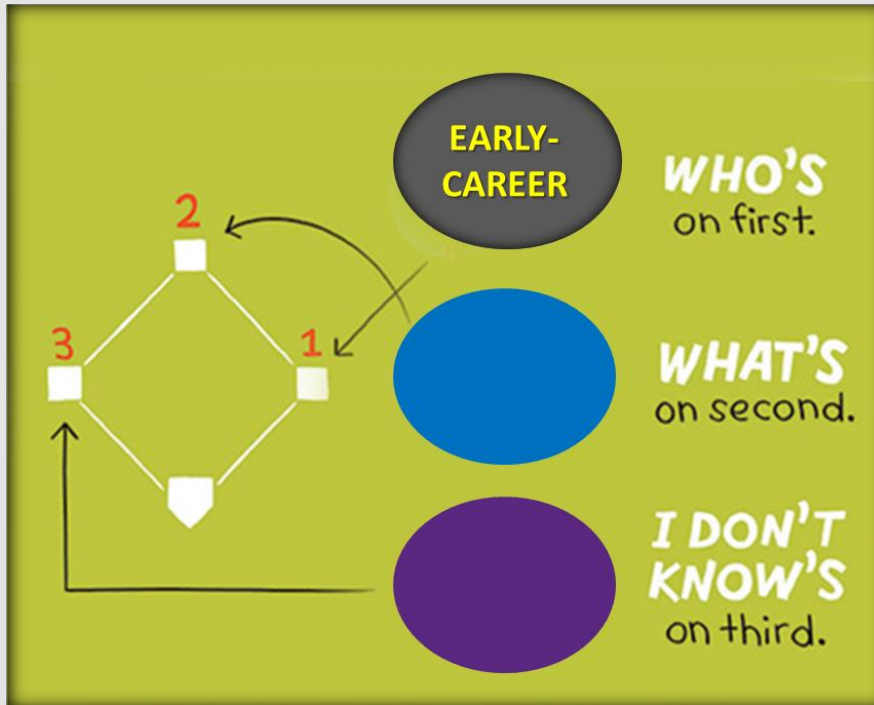
Helps CBOP fulfill responsibilities

Available at no cost to your conference

The Cycle



Who's on First?



Early-Career Seminar

WHO:

Clergy in first
five or 10 years of ministry

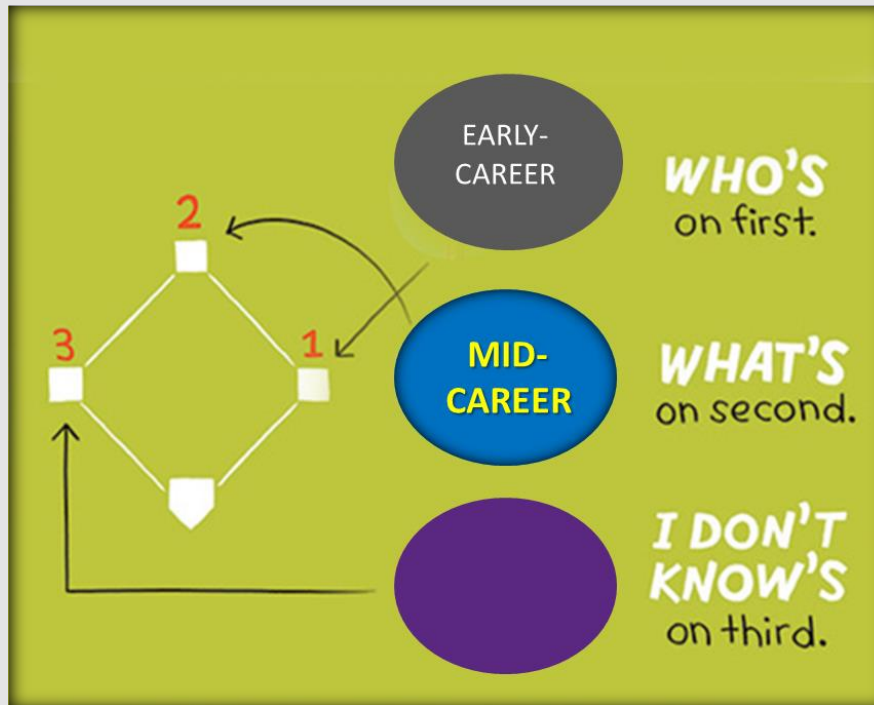
WHEN:

Spring/Fall

Who's on First?

- Generally difficult to attract attendance
 - revitup!
- Some topics include:
 - Emphasis on personal saving
 - Managing Benefits Access account
 - EY Financial Planning Services
 - LifeStage Solution Suite

Standing Double



Mid-Career Seminar

WHO:

Clergy in middle stages
of career

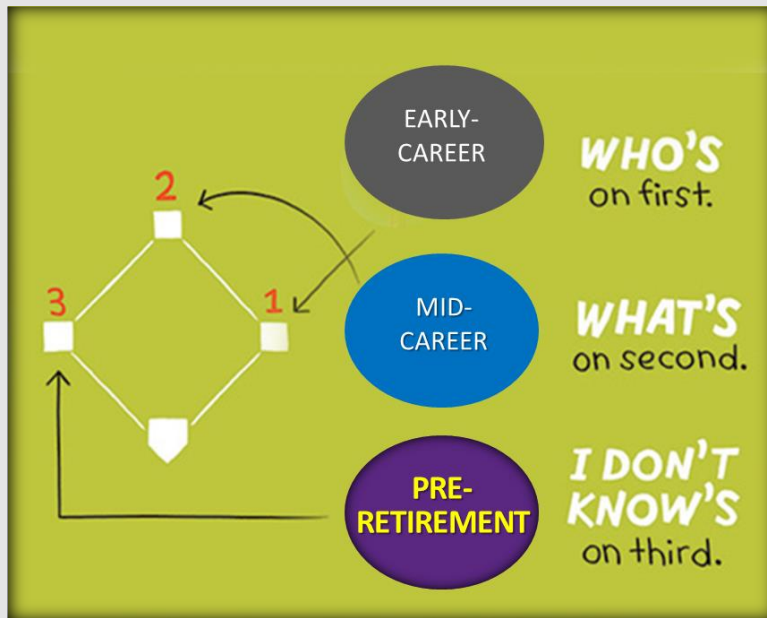
WHEN:

Spring/Fall

Standing Double

- Retirement benefit projections
- Comprehensive review of all clergy benefit plans
- Some topics include:
 - All Wespath-administered retirement plans
 - Investment allocations
 - LifeStage Solution Suite
 - EY Financial Planning Services

Rounding Third



Pre-Retirement Seminar

WHO:

Conference specifies target audience

- Age 50 and older
- Within five to 10 years of retirement
- Everyone welcome

WHEN:

Spring/Fall

Rounding Third

- Comprehensive review of all clergy benefit plans
- Some topics include:
 - All Wespath-administered retirement plans
 - EY Financial Planning Services
 - Housing allowance exclusion

Heading Home—The Fall Classic



Retirement Seminar

WHO:

Current class of retirees
and spouses

WHEN:

February through April

Heading Home—The Fall Classic

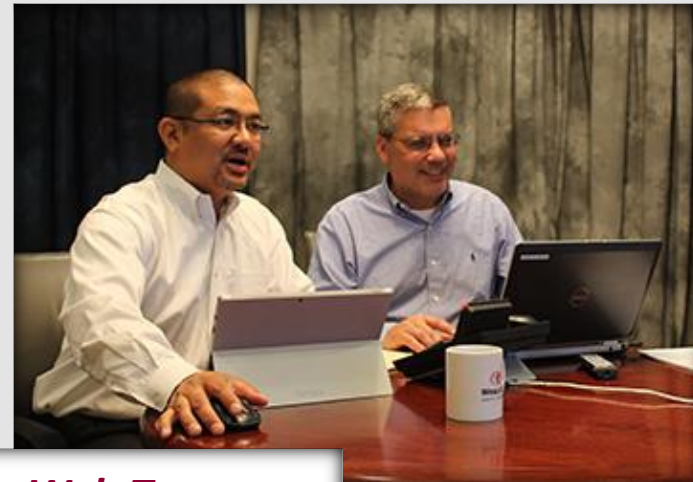
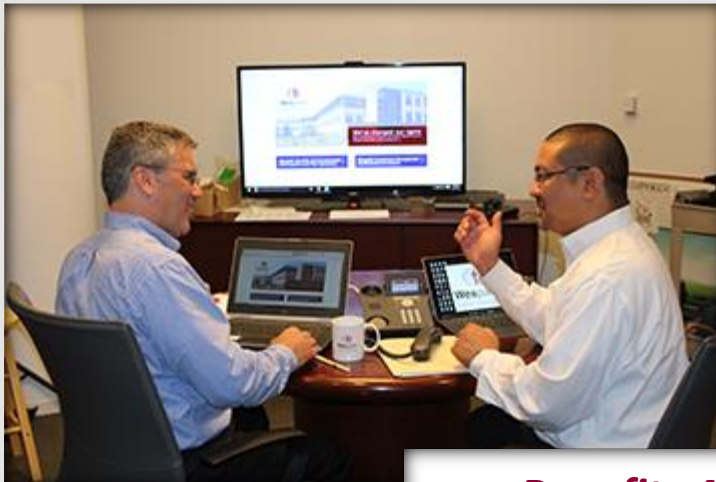


- Comprehensive review of all clergy benefit plans
- Step-by-step review of AFB package
- Conferences that have utilized

Conferences Hosting Retirement Seminars for Current Year Retirees



Live Webcasts



Benefits Access Web Tour

- Audience-specific
- Well suited for multiple or remote locations
- Allows real-time interaction
- Since 2007—“Webcast for 20xx Retirees”

Participant Events

Clergy Benefits Academy

- **Who**—clergy of all ages
- **When**—February and October
- **Where**—regionally across United States
 - Flagship event



“

*The speakers were informative,
inspirational and energetic.*

*Wonderful humor and good application
to real life situations.*

Best use of my time in a long time.

”

Clergy Benefits Academy 2016

October 24-26, 2016

Hilton Branson Convention Center
200 East Main Street
Branson, Missouri

BE | INSPIRED



Clergy Benefits Academy



"The conference far exceeded my expectation!"

Participant Events

revitup!—Education, Worship, Fellowship

- **Who**—clergy ages 25-39
- **When**—November
- **Where**—rotates around the country
 - First offered in 2013
 - Positive response from clergy



revitup! 2016

revitup!

For a Lifetime in Ministry



An Energizing Event for Young Clergy

**November 7-9, 2016
B Resort & Spa
Lake Buena Vista (Orlando), Florida**

Brighten your Future.

Gain information and inspiration.

Put yourself at the top of your list!

Plan to attend revitup!...For a Lifetime of Ministry!

Consultations

- Informal or scheduled
- Individual time with Benefits Educator
- Explore participant's Benefits Access account
- Address personal/private concerns
- Review Retirement Benefits Projections

Annual Conference Consultations

- **Who**—clergy or lay employees
- **When**—May/June
- Scheduled individual consultations
 - Review Retirement Benefits Projection
 - Review Benefits Access account
 - Private/confidential

Lay Employees

- **Who**—lay employees of UMC-affiliated organizations
 - Conference offices
 - Children’s homes
 - Retirement homes
 - Larger local churches
- **When**—year-round
- **Where**—plan sponsor gatherings (e.g., for “Tulsa Area Lay Employees”)

Discuss UMPIP and services available from Wespath



If You Schedule It, They Will Come!

Benefits Educators

1-800-851-2201 • wespath.org

Questions?





Wespath

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