



Wespath

BENEFITS | INVESTMENTS

CONFERENCE FORUM

Customer Service Update

Agenda



Administrative Updates



System Enhancement

Contribution Management

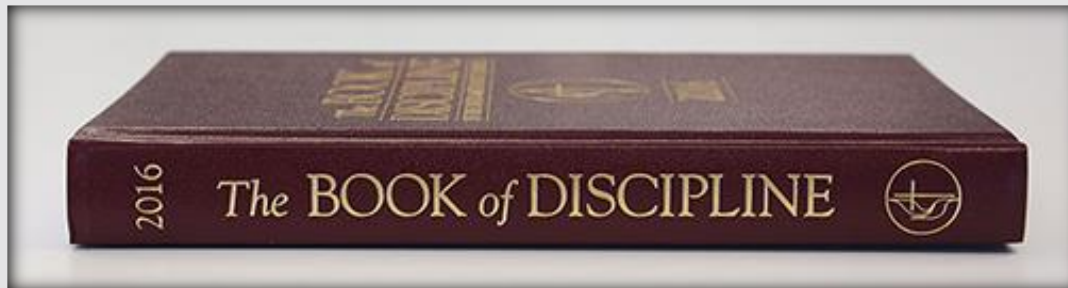
Used by
1,324 plan sponsors
(including 44 conferences)



- Offers system scalability
- Meets stewardship goal
 - 144,000+ bills mailed each year
 - 21,000+ manual exceptions in 2015

Promotional campaigns
will begin in Q3

Mandatory Retirement Age



BOD Paragraph 357.1—age 72 for clergy

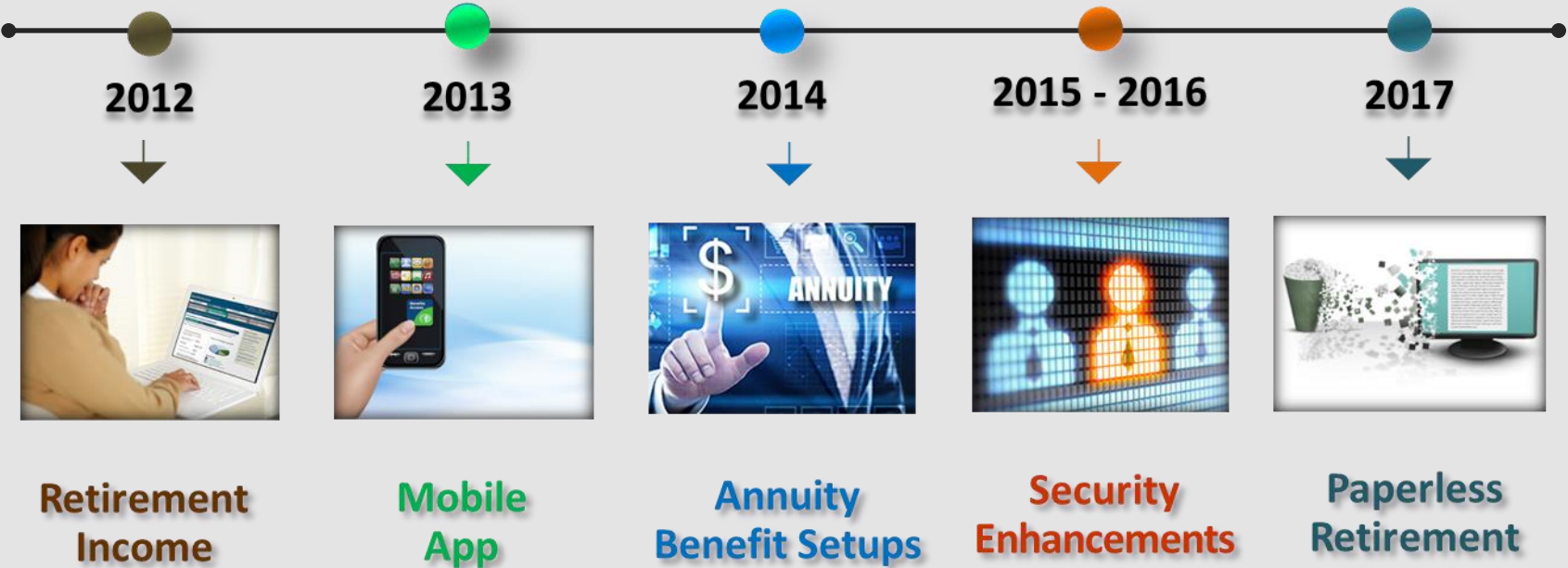
BOD Paragraph 408.1—age 68-72 for bishops

Conduct Review and Notify Conference

- Adjust CRSP DB* service
- CRSP DC*, CPP* and UMPIP* contributions (including investment gains/losses) will be refunded

- * **CRSP DB**—Clergy Retirement Security Program defined benefit
- DC**—defined contribution
- CPP**—Comprehensive Protection Plan
- UMPIP**—United Methodist Personal Investment Plan

Benefits Access—Participant Portal



Retirement Season



Why Paperless Retirement?

- Increase processing efficiency and accuracy
- Reduce invalid form submissions from participants
- Enable real-time view of benefit amount changes when electing payment options
- Address frustration with forms-based process
- Promote LifeStage Retirement Income for distributions
- Encourage greater participant engagement

Wespath Support

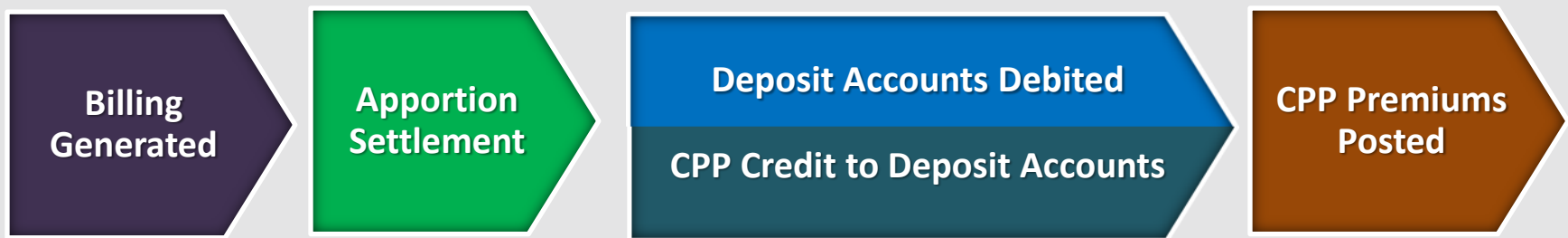
How will we support participants?

- 70% of Intends to Retire participants are registered for Benefits Access
- Retirement Team calls unregistered participants
- Wespath offers assistance with registration and benefits set-up

CPP Premium Holiday

Two-year CPP Premium Holiday Approved in 2015

January 1, 2018 – December 31, 2019



CPP Premium Holiday

Summary

| | Market Value | Units |
|---------------------------------------|----------------|---------------|
| Beginning Balance | \$62,984.04 | 5,241.6812 |
| Credit | | |
| Deposit | \$402,013.22 | 33,443.1336 |
| Insurance Deductions | \$8,745.91 | 727.5345 |
| CPP Premium Holiday Offset | \$63,510.20 | 5,283.1830 |
| Debit | | |
| Monthly Settlement | (\$133,830.82) | (11,132.9001) |
| Insurance Deduction Fee | (\$87.46) | (7.2722) |
| Special Grants | (\$300.00) | (24.9557) |
| Dist of Health Insurance | (\$8,762.40) | (729.2216) |
| Realized Gain/Loss | \$112.57 | |
| Change in Unrealized Gain/Loss | (\$75.68) | |
| Ending Balance | \$394,309.58 | 32,801.1827 |

"Change in Unrealized Gain/Loss" is for the dates specified above.
 Unable to calculate Income Earned - Net for time periods beginning prior to January 1, 2012

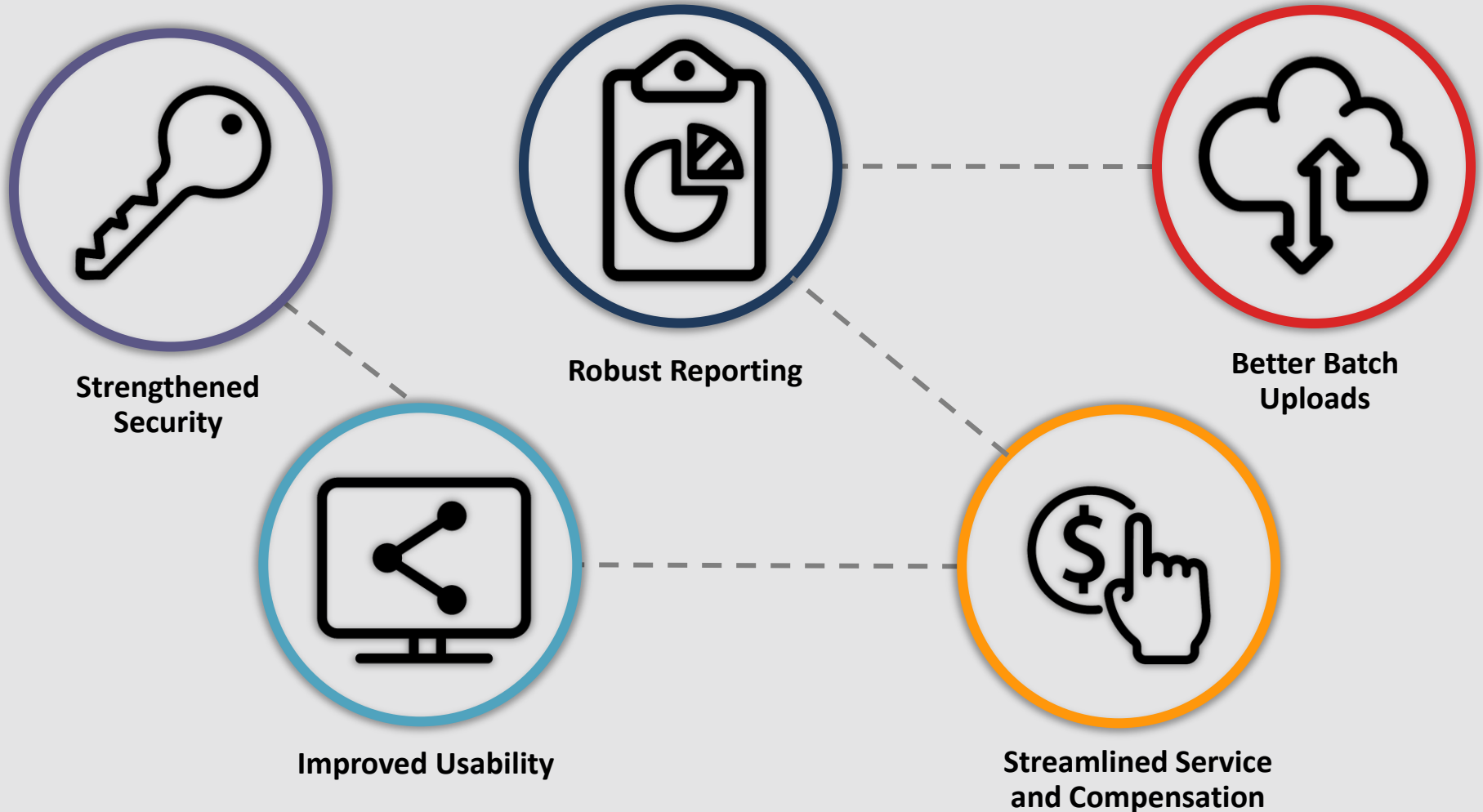
Detail

| Trade Date | <input type="text" value="All Activity"/> | <input type="text" value="All Funds"/> | Unit Price | Units | Amount |
|------------|---|--|------------|---------------|----------------|
| 01/29/2010 | CPP Premium Holiday Offset | STIF | \$12.0212 | 5,283.1830 | \$63,510.20 |
| 01/29/2010 | Monthly Settlement | STIF | \$12.0212 | (11,132.9001) | (\$133,830.82) |
| 01/26/2010 | Insurance Deductions | STIF | \$12.0213 | 727.5345 | \$8,745.91 |
| 01/26/2010 | Insurance Deduction Fee | STIF | \$12.0213 | (7.2722) | (\$87.46) |
| 01/26/2010 | Special Grants | STIF | \$12.0213 | (24.9557) | (\$300.00) |
| 01/19/2010 | Deposit | STIF | \$12.0208 | 33,443.1336 | \$402,013.22 |
| 01/04/2010 | Dist of Health Insurance | STIF | \$12.0161 | (729.2216) | (\$8,762.40) |

Conference Staff Training



The New Benefits Access Portal (BAP)



BAP Breakout Session



Two Learning Opportunities

System Enhancements:
Benefits Access Portal Changes

Questions



Plan Sponsor Managers

1-800-269-2244, ext. 4003

8:00 a.m. – 6:00 p.m.,
Central time

psmteam@wespath.org



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