



Wespath

BENEFITS | INVESTMENTS



Our records indicate you are eligible to retire at the next annual conference session. Whether you plan to retire now or later, take steps to prepare.



1. Verify Your Personal Information and Beneficiaries

You may miss important communications if you move or change your phone number or e-mail address. It's also important to verify beneficiaries—and their contact information—so that Wespath knows how to distribute your account balances and/or death benefits.

[Review and update personal information on Benefits Access](#)—Log in and go to **My Benefits > Personal Profile > Personal Information**.

[Review and update beneficiaries on Benefits Access](#)—Log in and go to **My Benefits > Personal Profile > Beneficiaries**.



2. Verify Your Spousal Information and Service Record

Errors in your spousal information or service record could result in inaccurate benefit

projections or payments.

[Review your spousal information on Benefits Access](#)—Log in and go to **My Benefits > Personal Profile > Personal Information**. Contact the Wespeth Retirement team at **1-800-883-4078** to make updates.

[Review your service on Benefits Access](#)—Log in and go to **My Benefits > Personal Profile > Service and Compensation**. Contact your conference office to correct any errors immediately to prevent a delay in benefit payments.



3. Update Your LifeStage Personal Investment Profile

LifeStage Investment Management invests your defined contribution account based on your Personal Investment Profile. Review your risk tolerance and, if you have a Ministerial Pension Plan (MPP) account balance, verify your “**Expected Benefits Commencement Date**”—the date you plan to begin your lifetime benefit payments.

[Review your LifeStage on Benefits Access](#)—Log in and go to **Take Action > Manage Investments > Change LifeStage Personal Investment Profile**.



4. Project Your Retirement Income

Wespeth offers three online planning tools: the [Retirement Readiness Tool](#), the Retirement Benefits Projection, and the LifeStage Retirement Income Calculator. Read about these tools [here](#).

[Project your retirement income on Benefits Access](#)—Log in and go to **Take Action > Project Future Values**.



5. Ask About Retiree Health Benefits

Health care costs can be a significant factor in your retirement planning. You may want to speak to your conference benefits officer regarding retiree health benefits.



6. Get a Comprehensive, Personalized Financial Plan from EY

A planner at [EY Financial Planning Services](#) can help you develop or revise your comprehensive financial plan and help you decide if you are financially prepared for retirement at **no additional cost** to you.* To get started, call EY at **1-800-360-2539** business days from 8:00 a.m. to 7:00 p.m., Central time.



7. Provide Your Retirement Notification

Paragraph 357 of *The Book of Discipline 2016* requires you to notify your bishop, cabinet and board of ordained ministry of your intent to retire at least 120 days prior to your retirement date.

Need Assistance? Call Wespath!

A Retirement Team Specialist is here to help at **1-800-883-4078**.

**Costs for these services are included in Wespath's operating expenses that are paid for by the funds.*

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Our address is 1901 Chestnut, Glenview, IL 60025

To contact Wespath Benefits and Investments, [click here](#).