

October 29, 2020

<FirstName LastName>
<Company (if appropriate)>
<Address>
<Address>
<City>, <State> <ZIP>

RE: Retirement Eligibility

Dear <FirstName LastName>:

Congratulations and thank you for your service! Our records indicate that you will be eligible to retire at the next annual conference session. Whether you decide to serve well into the future or retire sooner, Wespath will be here to assist you every step of the way.

In the meantime, we encourage you to take a few simple steps in preparation for your future retirement:

1. Log in to Benefits Access to Review and Update Your Personal Information

You may miss important information about your benefits if you move or change your personal information (e.g., 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.

If you have not yet registered on Benefits Access, visit **benefitsaccess.org**, click "**New User Registration**" on the log in screen and follow the prompts.

To verify and update your personal information or beneficiaries:

- Log in to Benefits Access at **benefitsaccess.org**
- Click "**Profile**"
- Select "**Personal Information Summary**" or "**Manage Beneficiaries**"

Be sure to verify the accuracy of your marital status and spouse information (listed below) to ensure your benefit options are calculated correctly. To update your information, contact Wespath's Retirement Team at **1-800-883-4078**.

Marital status on file:

Spouse on file:

2. Verify Your Service Record

Errors in your service record could result in inaccurate benefit projections or payments. To review your service record:

- Log in to Benefits Access at **benefitsaccess.org**
- Click "**Profile**"
- Select "**Service & Compensation**"

Contact your conference office to correct any errors immediately to prevent a delay in benefit payments.

3. Update Your LifeStage Personal Investment Profile

If you are enrolled in LifeStage Investment Management, your retirement savings are invested based on the information in your Personal Investment Profile. Review this profile to ensure your risk tolerance is accurate. If you have a Ministerial Pension Plan (MPP) account balance, also check to make sure your "Expected Benefits Commencement Date"—the date on which you anticipate annuitizing and beginning your lifetime retirement benefit payments—is accurate.

To update your LifeStage Personal Investment Profile:

- Log in to Benefits Access at **benefitsaccess.org**
- Click "**Distributions**"
- Select "**LifeStage Retirement Preferences**"

4. Project Your Retirement Income

Wespath offers three online planning tools: the **Retirement Readiness Tool**, the **Retirement Benefits Projection**, and the **LifeStage Retirement Income Calculator**.

To use these projection tools:

- Log in to Benefits Access at **benefitsaccess.org**
- Click "**Learn**"
- Under "**Retirement Projection Tools**" select your desired tool

5. Get a Comprehensive, Personalized Financial Plan from EY

Wespath promotes holistic financial well-being by offering EY Financial Planning Services at no additional cost to you.* An EY planner can help you develop or revise your comprehensive financial plan and help you decide if you are financially prepared for retirement. To get started, call EY at **1-800-360-2539**, business days from 8:00 a.m. to 7:00 p.m., Central time or visit EY's website at **wespath.eynavigate.com**.

6. Provide Your Retirement Notification

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

Wespath is eager to help you make your next move. Please call a Retirement Team Specialist at **1-800-883-4078** for assistance.

Sincerely,

Wespath Benefits and Investments

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