

To: Moving and Newly Appointed Pastors
From: BeLinda Carnegie, Benefits Coordinator
Date: April 20, 2016
Subject: Pension Considerations When Moving To A New Appointment

Congratulations on your new appointment within the Alabama-West Florida Conference. Below are some things you will need to consider regarding your new appointment.

First, after Annual Conference, your new appointment will be entered in the General Board of Pension and Health Benefits' (GBOPHB) Benefit Access computer system. If you are currently enrolled in the Clergy Retirement Security Plan (CRSP) benefit, your current enrollments will remain the same unless your status changes from part-time to full-time or vice versa. Once I have received a completed Pastor Compensation Form, I will enter your information. *(Please make sure you provide your complete home address with city, state and zip, phone number and email address).* If you are not currently enrolled in the retirement program, you will need to complete the CRSP Enrollment Form, the Beneficiary Designation form, and the United Methodist Personal Investment Plan (UMPIP) Contribution Form. Clergy appointed full-time or at 75% are required to enroll in the plan. Clergy appointed at 50% or less are not eligible for the contributions into CRSP, but will need to complete the enrollment form for service tracking purposes. Clergy appointed at less than 50% can enroll and make contributions to UMPIP.

If your appointment status is "Supply Pastor", you are not eligible for enrollment in CRSP. However, the church at which you are appointed can become a UMPIP sponsor and enroll you in the plan as a lay employee.

Secondly, your UMPIP account is established with the church you are currently serving and is not automatically transferred with your new church appointment. If you want to continue to make contributions to your UMPIP account, you must complete a new agreement establishing the contribution amount at the new church appointment. The UMPIP Contribution Agreement form can be faxed, scanned and emailed or mailed to the Fiscal Office to my attention. If you are a first time enrollee to UMPIP, you will need complete the CRSP Enrollment Form along with the UMPIP Contribution Agreement Form.

Finally, if you are currently enrolled in the Conference health insurance plan and your status is not changing from a full-time appointment, you will remain enrolled in the plan. If your status is changing from an active full-time appointment to a part-time appointment at less than 75%, you will not be eligible to participate in the health plan. Your health/dental coverage will terminate on June 30, 2016. If you are a newly appointed pastor and have a status of full-time or part-time serving at 75%, you must enroll in the Conference Health Insurance Plan, unless you have coverage in an approved alternate health group plan; proof of coverage must be provided. Health enrollment forms are located on the Conference's website under the Pension and Health Benefits tab.

The billing for your pension benefits and/or health coverage benefit will be effective at the new appointment beginning July 1, 2016.

If you have any questions, please give me a call (888-873-3127) or email me (belinda@awfumc.org).

Office of Pension and Health Benefits