Simple. Accurate. Integrated.

Wespath Benefits and Investments partners with Paychex to offer payroll processing and human resource administration services to their members. Paychex also offers deduction management and transmission services at no additional cost to annual conferences and other plan sponsors who offer Wespath-administered retirement plans.

Paychex can **simplify your ministry's benefit management and payroll process** by allowing you to integrate your Paychex data, facilitating the payment of Wespath retirement employer and employee contributions. Paychex will transmit the information to Wespath each check date, saving you time and preventing costly errors. Enroll today.

How Does this Service Help?

Today, the payroll manager at each ministry must manually calculate Wespath retirement contributions, update their current payroll system and separately transmit that information to Wespath. Once enrolled with Paychex, the payroll manager only has to communicate total wage and hour information to Paychex. We'll take care of the rest, including pre-tax, Roth and after-tax deferrals, contributions and optional employer contributions to the Wespath retirement programs. Each check date, this data will be transmitted directly to Wespath.

Who is Eligible for this Service?

Any UMC employer enrolled in both Wespath retirement plans and Paychex Flex® payroll is eligible to enroll.

What If I'm Not a Paychex Payroll Client?

No problem. Enrolling in Paychex is an easy process. **Plus, our partnership with Wespath gives you access to special savings on payroll packages**. Key benefits include:

- 35 percent discount on payroll administration fees
- Waived Form W-2 base fee
- Designated services team
- Retirement deduction management
- Additional optional services such as: HR Solutions, workers' compensation, time and attendance, applicant tracking and recruiting, electronic onboarding, and more.

Email us at **wespath@paychex.com** to discuss specific solutions for your ministry.

Wespath BENEFITS | INVESTMENTS

PAYCHEX®
Payroll | Benefits | HR | Insurance

I am a Paychex client. How do I enroll?

Simply complete and sign the attached one-page service agreement addendum and questionnaire, and email the forms to us at wespath@paychex.com. A United Methodist-designated specialist will contact you to collect your plan information. Transmittal services will begin with your organization's first check date, as indicated in the agreement addendum. **Contact us today!**

General Questions and Information:

Enrollment:

Phone:

- The Paychex service agreement addendum for this program grants Paychex permission to transmit your company and employee information as specified in the addendum to Wespath Benefits and Investments. All fields—including Federal Employer Identification Number (FEIN), Wespath employer number and your beginning check date—must be completed.
- Employers are responsible for communicating their plan specifications to Paychex at enrollment, as well as at any time there are changes to their plan. Items to provide to your Paychex specialist include, but are not limited to:
  - Employee contribution percentages or amounts for pre-tax, Roth, after-tax, and catch-up contributions
  - Employer contribution elections and formulas (e.g., match, non-match, conditional, discretionary)
- Paychex clients must process payroll with the United Methodist-designated payroll specialist team, which might mean changing your specialist. The ability to provide this integrated service requires specific account coding which must be maintained through the dedicated team.
- Wespath will turn off the employer's monthly retirement plan billing to avoid duplicate processing/drafts as of the first check date with Paychex, which will be provided to Wespath to facilitate this process. New clients' last submission to Wespath will be on the final check date prior to the first check date with Paychex (e.g., Dec. 31 - Wespath/Jan. 15 - Paychex).
- Checks that are voided after the check date will be prohibited to ensure data integrity. Alternative solutions are available and should be discussed with your payroll specialist.
- Wespath will receive the Paychex-transmitted data at 1 a.m., CT after each check date. Wespath is responsible for plan management and drafting funds from employer-designated bank accounts.

Any questions regarding your retirement plan specifications should be directed to Wespath at **1-800-851-2201**.

Wespath BENEFITS | INVESTMENTS

PAYCHEX®
Payroll | Benefits | HR | Insurance

Read and sign this form.

PAYCHEX®

Paychex Agreement Addendum for Strategic Accounts

Company Name ____________________

Office/Client Number ____________________

Federal ID Number ___ ___ ___ ___ ___ ___ ___ ___ ___

Client hereby requests to amend the Paychex Agreement between Client and Paychex, Inc. ("Paychex") dated ____/____/____ ("Agreement") by addition of the terms set forth below.

WHEREAS, Wespath Benefits and Investments ("Wespath") administers Client's 403(b) retirement savings plan, the United Methodist Personal Investment Plan ("UMPIP"), and its welfare plan, the Comprehensive Protection Plan (CPP); and

WHEREAS, Client desires that Paychex share certain Client Confidential Information with Wespath.

NOW, THEREFORE, the parties agree as follows:

1. **Communication with Wespath.** Client hereby authorizes Paychex to share Client Confidential Information with Wespath, or any other third-party administrator identified by Client, including, without limitation, information related to Client's payroll, Paychex Services used by Client, Paychex client ID number, employee name, employee Social Security number, check date, employee contributions, employer contributions, loan repayments, Client Federal Employer Identification Number and other necessary data required to support the administration of UMPIP and/or CPP.

2. **Payroll Related Codes.** Client hereby authorizes Paychex to rename earnings and deduction codes in Client's payroll to match any naming conventions required for the administration of the data integration with Wespath.

3. **Disclaimer.** Client understands that Paychex is not transmitting funds and is not responsible for any payments or compliance functions relative to Client's UMPIP and CPP. Paychex is providing the data to Wespath at the request of, and, as a convenience for, the Client based on Client Confidential Information provided. Client is responsible for verifying the accuracy of Client Confidential Information on reports Paychex provides and coordinating with Wespath in the event of any errors or adjustments. Paychex is not responsible for the acts or omissions of Wespath, including, without limitation, any errors, or security or confidentiality obligations of Wespath. Client is solely responsible for promptly advising Paychex in writing of any termination or other change in its relationship with Wespath or any change in the authority provided in this Addendum.

4. **Third-Party Services.** At Client's option, Client can integrate certain third-party services into the Services. These third-party services are not provided by Paychex. Client agrees to hold harmless and release Paychex from any liability relating to Client's use of third-party services or integration of the Services with third-party services. Client's ability to use third-party services may be limited according to the third-party's terms and conditions. When Client integrates with a third-party service, Client authorizes Paychex to share any Client data, including Client Confidential Information, as may be needed by the third-party to provide the third-party services. Paychex is not liable for any disclosure of Client Confidential Information by third-party. If Client does not opt to integrate third-party services into the Services, the provisions of this Third-Party Services Section shall not apply.

5. **Termination.** Client may terminate this Addendum by providing Paychex not less than 30 days prior written notice of termination.

This Addendum is not intended to modify or replace any other provision of the Agreement, except as expressly set forth above.

Authorized Officer's Name____________________ (PRINT) **Title** ____________________

Authorized Officer's Signature____________________ **Date** ____________________

Wespath Employer Number: ____________________ Payroll Frequency:____________________

Paychex 403(b) Set up Questionnaire

Plan(s) Sponsored

1. Select all that apply:
   - ❑ United Methodist Personal Investment Plan (UMPIP) contributions for Clergy
   - ❑ United Methodist Personal Investment Plan (UMPIP) contributions for Lay
   - ❑ Comprehensive Protection Plan (CPP) contributions for Clergy (extension ministry only)
2. Does your organization contribute to any other 403(b) plans or retirement programs besides those administered by Wespath Benefits and Investments? If yes, please explain in detail.

Employee Contribution Types

3. The following employee contribution types are provided by default:
   - UMPIP BeforeTax
   - UMPIP Roth
   - UMPIP AfterTax
4. Complete any automatic feature elections that may apply to employee contribution types above:
   - ❑ Automatic enrollment for employee contributions elected at ________%
   - ❑ Automatic contribution escalation elected at ________% annual increase up to maximum of ________%
   - ❑ Automatic contribution escalation effective month ________________________

Employer Contribution Types

5. Does your organization provide employer contributions?
   ❑ Yes *(if selected, complete section 6)* ❑ No
6. Please describe your employer contribution types:
   - ❑ UMPIP Matching contribution of ________% of participant's contribution up to ________% of participant's compensation
   - ❑ UMPIP NonMatching contribution of ________% of participant's compensation
   - ❑ UMPIP Conditional contribution of ________% of participant's compensation if participant contributes ________% of compensation
   - ❑ UMPIP Discretionary contribution
7. If your organization sponsors more than one plan, please describe the additional employer contribution types:
   - ❑ UMPIP Matching contribution of ________% of participant's contribution up to ________% of participant's compensation
   - ❑ UMPIP NonMatching contribution of ________% of participant's compensation
   - ❑ UMPIP Conditional contribution of ________% of participant's compensation if participant contributes ________% of compensation
   - ❑ UMPIP Discretionary contribution
8. Does your organization have any other contribution types? If yes, please explain in detail.

Program Acknowledgement

❑ I certify that the above information is true and accurate, and completely describes the entire retirement plan participation for the organization. I attest that there are no other contribution types or companies/plans for retirement programs.
I understand that if this information is incorrect, Paychex will not be able to correctly set up all the deduction codes which may be required. Paychex will load information exactly as provided above.

Organization Name: ______________________________ Wespath Employer Number: ______________________

Contact Name: ______________________________ Job Title: ______________________________

E-mail Address: ______________________________ Phone: ______________________________

Signature: ______________________________ Date: ______________________________