Wespath

BENEFITS | INVESTMENTS

Benefits Education Services

a general agency of The United Methodist Church

The Wespath Benefits Education Team customized benefit education programs are available to all conferences. Our team offers a variety of services and educational opportunities including seminars, webinars and individual benefit consultations. Whether on-site or virtual, the Benefits Education team will partner with you on a plan that meets your needs.

Wespath Benefits Education Advantages

- Experienced professionals to assist participants with retirement and financial planning
- On-demand video content
- Customized content delivered on-site or virtually
- Fulfill Conference Board of Pensions responsibilities
- Available at no direct cost to the annual conference

The Benefits Education Team

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Products and Services

- One-on-One Benefits Education Consultations
- Retirement Seminars
- Pre-Retirement Seminars
- Early and Mid-Career Workshops
- United Methodist Personal Investment Plan Workshops
- HealthFlex Health and Wellness Programs Workshops

Benefits Education Virtual/Webinar Services

- Full-service webinars provided at no direct cost
- Registration assistance
- Wespath & annual conference panelists
- Benefit projections and materials provided

Benefits Education On-Site Services

- No direct cost to the annual conference
- Meetings and workshops
- Stand-alone or part of larger program
- Retirement benefit projections and print materials provided
- One-on-One Benefits Education Consultations

Virtual Consultations

On-Site Seminars

Webinars

Benefits Education Core Products and Services

One-on-One Benefits Education Consultations

Overview: Discuss your financial goals and learn how Wespath's services can help you achieve those goals. One-on-one consultations are available virtually and at all in-person events. Spouses are encouraged to attend.

Audience: All clergy and lay participants

Duration: 30 minutes (participants may request additional consultations)

Retirement Seminars

On-site or virtual Retirement Seminars are offered each year by annual conferences from January through June.

Overview: This seminar helps educate clergy on the steps they need to take before retirement, such as selecting annuities, cost-of-living adjustments, LifeStage Retirement Income, consolidating accounts into the United Methodist Personal Investment Plan (UMPIP) and reviewing available resources.

Audience: Current retirement class and spouses

Duration: In-person seminars last 2-2.5 hours; virtual seminars last approximately 1-1.5 hours.

Bonus: Educational materials and retirement projections will be provided to all participants (materials mailed for virtual seminars). On-site or virtual one-on-one benefits education consultations are offered with this event.

Benefits Education Core Products and Services (continued)

Pre-Retirement Seminars

On-site or virtual Pre-Retirement Seminars are offered to conferences by plan sponsors from August through December.

Overview: This seminar reviews all available clergy pension benefits, including from the Pre-82, Ministerial Pension Plan (MPP), Clergy Retirement Security Program (CRSP) and UMPIP. Benefit Educators will reinforce how to use Wespath resources to identify opportunities to increase retirement income.

Featured topics include:
- Distribution options in retirement
- EY Financial Planning Services
- Housing Allowance Exclusion
- LifeStage Investment Management

Audience: Clergy participants aged 50+ within 5-10 years of retirement

Duration: In-person seminar lasts 2–2.5 hours; virtual seminar lasts 1-1.5 hours.

Bonus: Personalized benefit projections, clergy service records and educational materials will be provided to all participants (materials mailed for virtual seminars). On-site or virtual one-on-one benefits education consultations are offered with this event.

Early and Mid-Career Workshops

Overview: These workshops focus on on important topics for participants who are further away from retirement, such as retirement savings—UMPIP (including Roth contributions) and CRSP—the importance of financial planning and EY Financial Planning Services, and the Benefits Access website.

Audience: Clergy aged 25-49

Duration: 90 minutes

Bonus: Personalized benefit projections, clergy service records and educational materials will be provided to all participants (materials mailed for virtual workshops). On-site or virtual one-on-one benefits education consultations are offered with this event.

Benefits Education Core Products and Services (continued)

United Methodist Personal Investment Plan Workshop

Overview: This workshop provides an overview of UMPIP. It covers the contribution types, limits, LifeStage Investment Management and services available to participants.

Audience: Clergy and lay participants, as well as conference and non-conference plan sponsors

Duration: 45-60 minutes

Bonus: Educational materials will be provided to all participants (materials mailed for virtual workshops). On-site or virtual one-on-one benefits education consultations are offered with this event.

HealthFlex Health and Wellness Programs Workshop

Overview: This workshop provides a broad overview of the health and wellness programs offered through HealthFlex. This presentation can be provided as a stand-alone offering or included a part of an event covering additional topics.

Audience: HealthFlex participants and plan sponsors

Duration: 60-90 minutes

Wespath Signature Events

Clergy Benefits Academy

Clergy Benefit Academy—a 3-day comprehensive event offered to clergy and spouses over the age of 39.

revitup! For a Lifetime in Ministry

Rev-it-Up—a 3-day comprehensive event offered to clergy and spouses 39 and under.

Delivered to You—a 2-day virtual event focusing on five dimensions of well-being that will inspire and encourage clergy of all ages and stages in ministry.

EY Financial Planning Services

EY Presenters

Presenters from EY Financial Planning Services are also available to support your on-site or virtual events. A variety of topics are available at various lengths of time. These services are available at no direct cost to you.

EY Workshops

- Early Career Financial Planning
- Late Career Financial Planning
- Achieving Financial Wellness
- Estate Planning Basics
- Social Security and Your Retirement
- Dissolve that Debt

Additional Services

- EY Financial Planner Line
- EY Navigate Website
- Benefits at a Glance Video Series
- Prerecorded Content

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Caring For Those Who Serve

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