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## Clergy Financial Well-Being Initiative



### Program Partnerships to Strengthen Clergy Well-Being

This fall, the Clergy Financial Well-Being Initiative is excited to partner with several United Methodist organizations focusing on clergy well-being. In October, the Initiative will provide a matching grant for [The National Plan for Hispanic/Latino Ministry](#) at a leadership summit in Phoenix, AZ and offer workshops on clergy well-being. The Initiative has also provided a matching grant for [Strengthening the Black Church for the 21st Century \(SBC21\)](#) to offer clergy wellness retreats. The Initiative will provide a matching grant and workshops on clergy benefits in Mid-October for the [Asian American Pacific Islander Clergywomen Association's](#) meeting in the Chicago area. On December 4, the Initiative will partner with [Gammon Theological Seminary](#) to hold a clergy training event in Atlanta as part of the Gammon Founder's Day celebration.

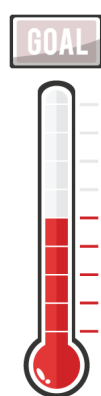


### Annual Conferences Focus on Well-Being for Underserved Clergy

The Initiative continues to develop annual conference partnerships. Upcoming Initiative-supported well-being events for underserved clergy are taking place in the East Ohio, West Ohio and Indiana conferences. Recent past events supported by the Initiative include an Illinois Great Rivers well-being retreat for Clergy of Color in cross racial/cross cultural appointments; a retreat that included an EY presentation during a Clergy of Color gathering in the Mountain Sky conference, and funding for debt relief through the Iowa Foundation for participants in a Saving Grace class. If your conference, foundation, or agency is interested in expanding resources that focus on the well-being of underserved United Methodist clergy, please contact Bonnie Marden at [clergyfinance@wespath.org](mailto:clergyfinance@wespath.org) to discuss potential projects.



### Matching Funds Appeal Update; Make Your Gift By September 30



Generous contributions from donors and partners like you are helping us move towards our \$250,000 matching funds goal to receive an additional \$250,000 from the Lilly Endowment Inc.'s National Economic Challenges Facing Pastoral Leaders Initiative. Your generosity and partnership help expand the relief and lives impacted through well-being and financial literacy opportunities. With your gift, we can help improve lives! If you would like to contribute, checks can be made payable to Wespath Benefits and Investments, with the memo line or payment voucher stating "Clergy Financial Well-Being Initiative," and mailed to:

Wespath Benefits and Investments  
P.O. Box 75783  
Chicago, IL 60675-5783

Our Lilly Endowment's deadline for receipt or written commitment of matching funds is September 30, 2023. Our deepest thanks to the foundations, other organizations, and individuals who have already donated to this cause.



## Saving Grace – Resources and Leader Tips

On August 8, the Initiative hosted a peer learning webinar on creative ways to use the financial well-being curriculum [Saving Grace](#) with your clergy, congregation, and community. One example shared by panelists was to meet monthly or bi-weekly rather than weekly giving participants more time to apply the learnings to their personal finance habits. [Watch the webinar.](#)

Contact Bonnie Marden at [clergyfinance@wespath.org](mailto:clergyfinance@wespath.org) for grant funding for Saving Grace projects or incentives for eligible participants.



*United Methodist leaders attend a gathering of grantees of the National Initiative to Address Economic Challenges Facing Pastoral Leaders funded through Lilly Endowment Inc. (left to right) Dale Jones, David Bell, Bonnie Marden, Jeff Vanderhoff, and Cary James.*

### UMC Clergy Financial Well-Being Initiative

For more information about this initiative and clergy financial well-being resources, visit: <https://www.wespath.org/for-plan-sponsors/UMC-clergy-financial-well-being>

Successfully expanding financial literacy depends on strategic collaboration.  
We look forward to working with you in 2023.

Connected in Christian Service,

Dale Jones, *Wespath Project Director*  
David Bell, *Project Chair*

Bonnie Marden, *Project Manager*

A collaborative project led by Wespath Benefits and Investments, General Board of Higher Education and Ministry, Discipleship Ministries and National Association of United Methodist Foundations funded by a Lilly Endowment Inc. grant through their Initiative to Address Economic Challenges Facing Pastoral Leaders.



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