



Conference Forum, March 4, 2021



Wespath

BENEFITS | INVESTMENTS

Benefits Education

Bob Christophel, Manager Benefits Education

Benefits Education...

- 2020 Review
- 2021 Outlook
- Benefits Education Catalog
- Delivered To You
- Annual Conference Support



Benefits Education 2020 Review

Benefits Education In a new reality

Live Webinars
Virtual Consultations
Recorded Views

On-site meetings and
Live Webinars
4,872

Virtual Benefit Education Consultations

581

2020 Total touchpoints
11,579

A nearly 90% increase
from 2019

2021 Outlook

Live Webinars
Consultations
Recorded Views

Full-service Webinar Hosting

Registration
Consultations
Benefit Projections
Materials Mailing

Benefits Education Catalog of Services



The image shows a two-page brochure for Wespath's Benefits Education Services. The left page features the Wespath logo (a cross inside a circle) and the text "Wespath BENEFITS | INVESTMENTS". Below this is a photograph of a man and a woman looking at a laptop. A blue box with white text reads "Benefits Education Services". At the bottom of the left page, it says "a general agency of The United Methodist Church". The right page has a blue header "BENEFITS EDUCATION SERVICES". The main text describes the customized benefit education programs available to all conferences, including on-site seminars, webinars, and individual consultations. It lists "Wespath Benefits Education Advantages" such as experienced professionals, on-demand video content, customized content, and fulfillment of pension responsibilities. At the bottom, it introduces "The Benefits Education Team" with three members: Rob Christophel (Manager, Benefits Education), Todd Creighton (Benefits Educator, Health Promotion Manager), and Frank O'Brien (Benefits Educator).

Wespath
BENEFITS | INVESTMENTS

Benefits Education Services

BENEFITS EDUCATION SERVICES

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 on-site 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 virtual
- Fulfill Conference Board of Pensions responsibilities
- Available at no direct cost to the annual conference

The Benefits Education Team

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a general agency of The United Methodist Church

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The Benefits Education Team



Bob Christophel
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Products and Services

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

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
- On-site meetings and workshops
- Stand-alone or part of larger program
- Retirement benefit projections and print materials provided
- On-site 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 workshop 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 workshops last 2-2.5 hours; virtual workshops 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 workshop 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 workshops lasts 2–2.5 hours; virtual workshop 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 Workshop

Overview: This workshop focuses 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 seminars). 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 seminars). 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 Benefit Academy—a 3-day comprehensive event offered to clergy and spouses over the age of 39.



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



Caring For Those Who Serve

1901 Chestnut Ave.
Glenview, IL 60025-1604
1-800-851-2201
wespath.org

Delivered To You

Delivered To You
DTY I and DTY II

FRAGILE
HANDLE
WITH CARE

Important
Material

137-5036
1173320248

FROM: WESPATH INVESTMENTS
2030 S FOSTER AVENUE
WHEELING IL 60090
US

SHIP DATE: 16OCT20
SHIP TO: 4:00:19 PM
CNO: 0101406/CP/E3313

BILL TO: PARTY

TO: **ROBERT CHRISTOPHEL**
2888 ESSEX ROAD
WANTAGH NY 11793 (US)

REF: WESPATH INVESTMENTS - PO# 17419 - 8502

TRK# 9276 6393 5550

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9622 0417 3 (000 000 0000) 0 00 9276 6393 5550

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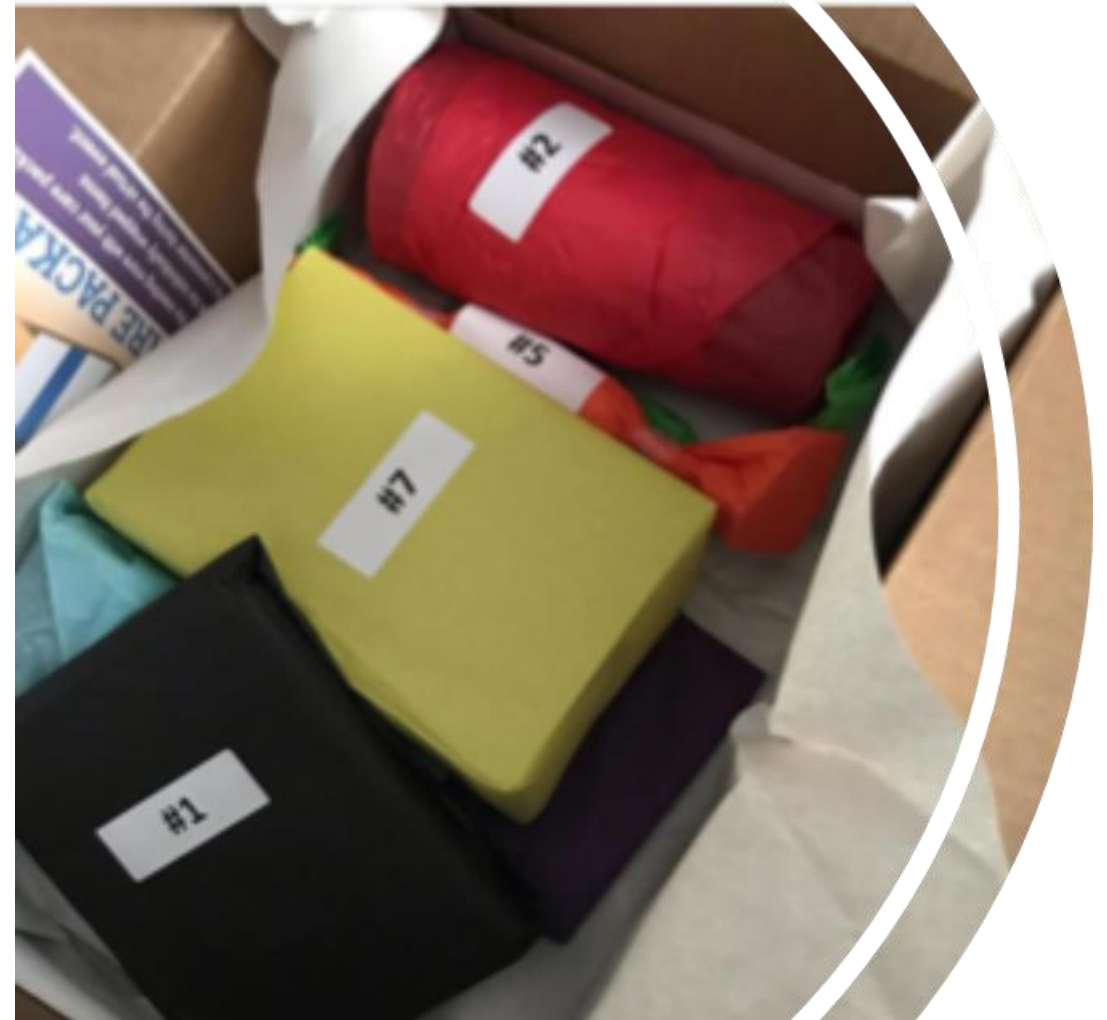
Wespath

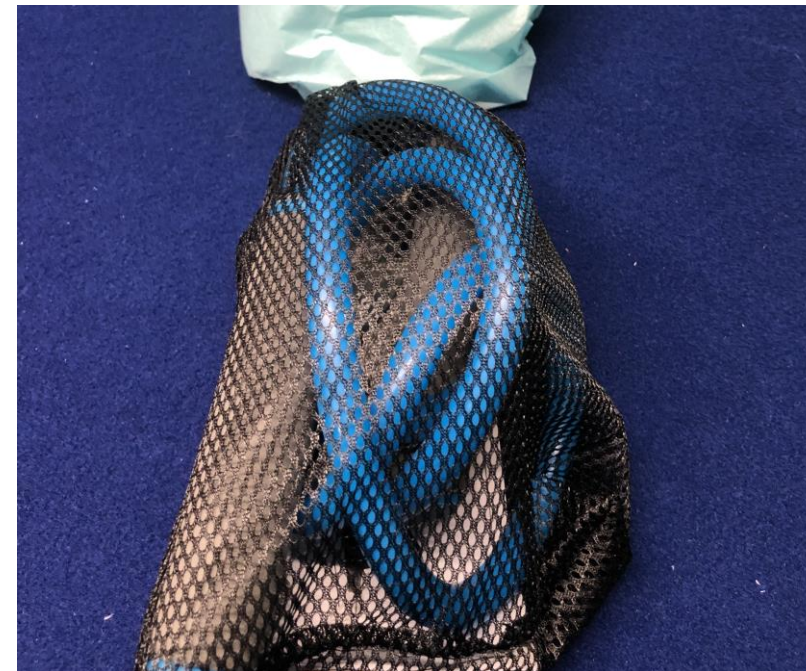
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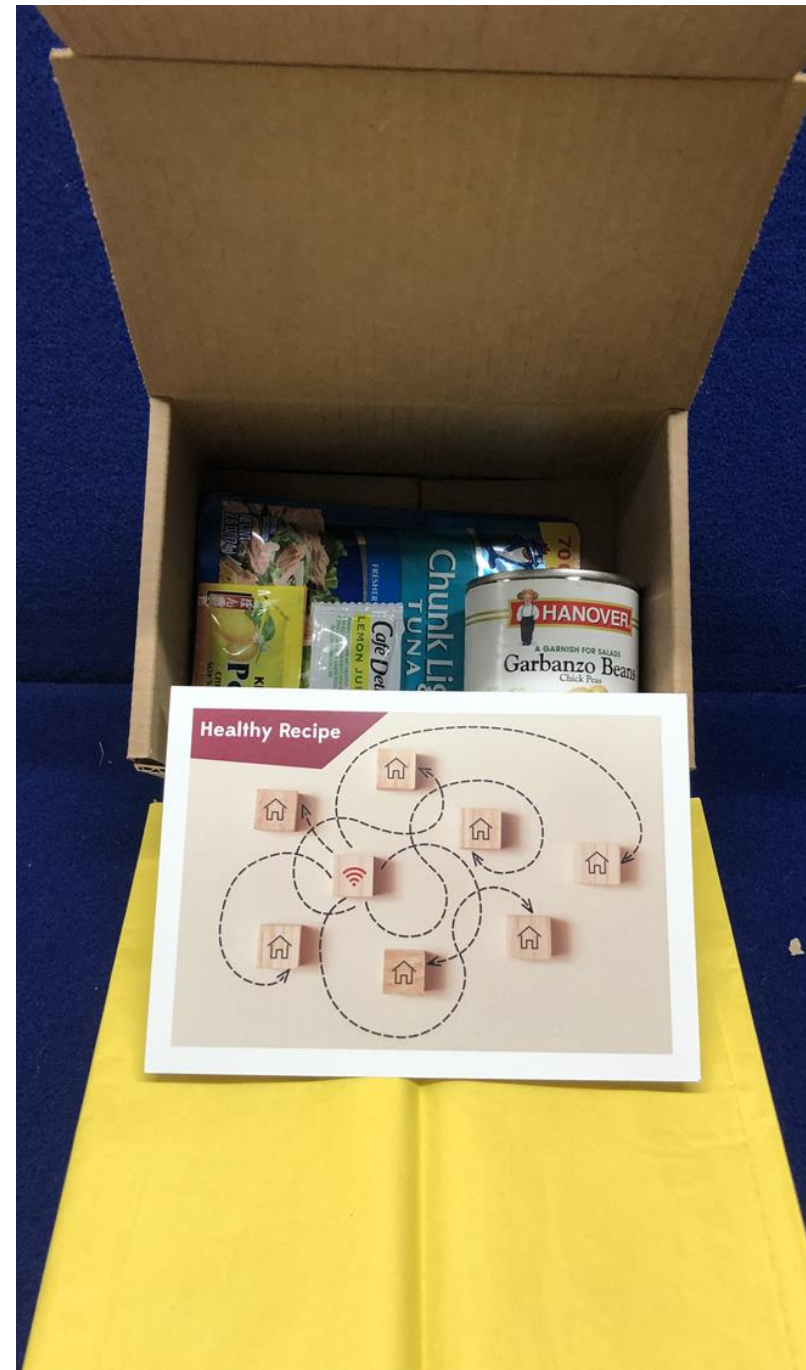
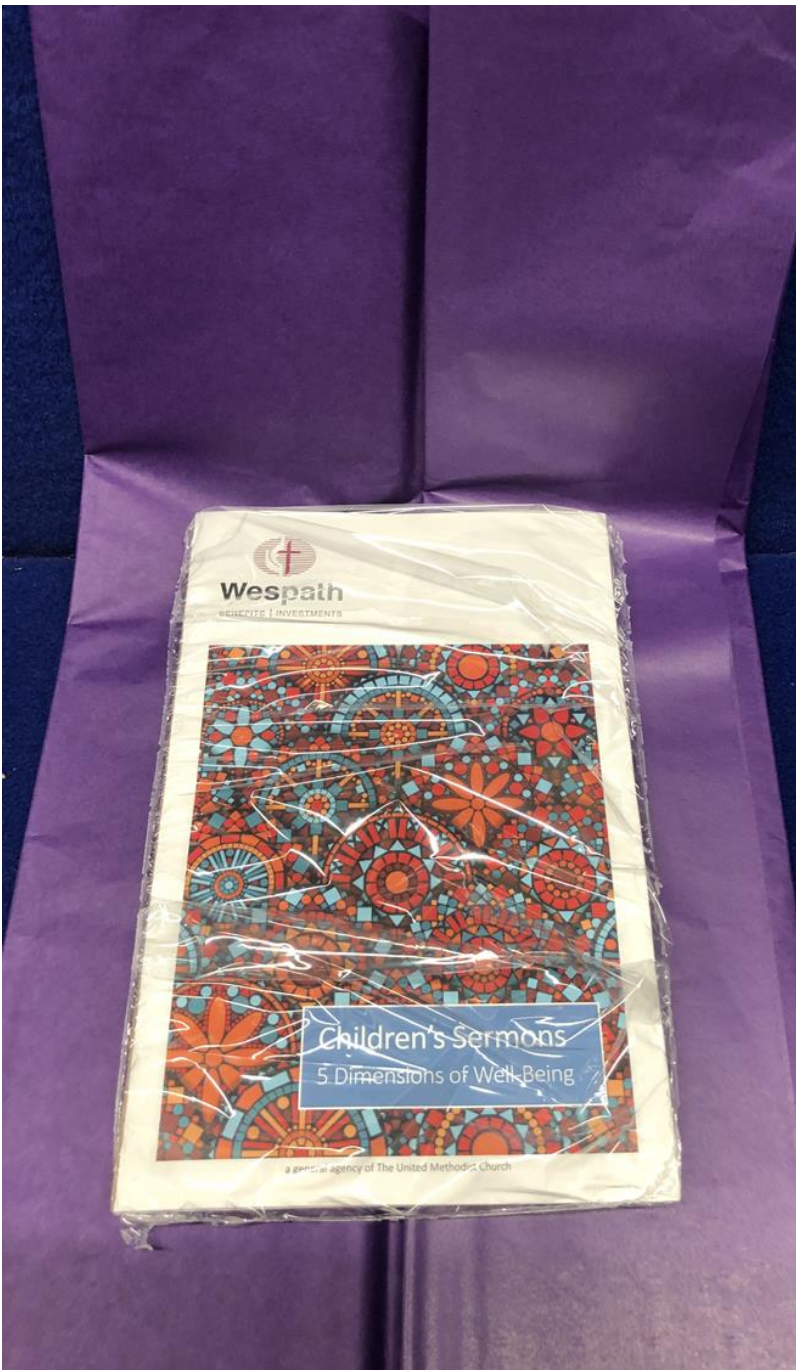


EVENT CARE PACKAGE

Fully participate and enjoy the meeting more with your care package.
DO NOT OPEN the individually wrapped items
until instructed by a presenter during the virtual event.











DTY-I – Hosts on the Set
Plum Studio, Milwaukee, WI



Annual Conference Support

Thank you...