



Wespath

BENEFITS | INVESTMENTS

CONFERENCE FORUM—MARCH 2018

Securing Our Future

A Strong Foundation



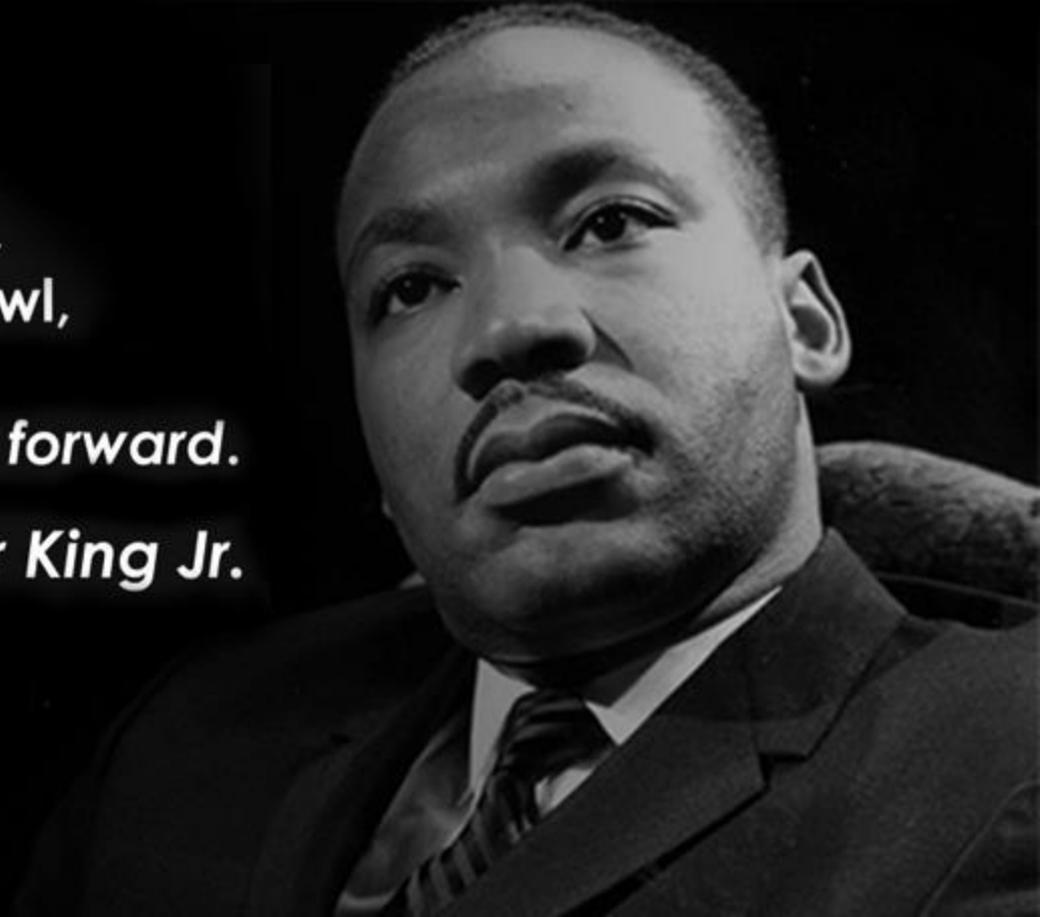
Everyone then who hears these words of mine and does them will be like a wise man who built his house on the rock.²⁵ And the rain fell, and the floods came, and the winds blew and beat on that house, but it did not fall, because it had been founded on the rock.²⁶ And everyone who hears these words of mine and does not do them will be like a foolish man who built his house on the sand.²⁷ And the rain fell, and the floods came, and the winds blew and beat against that house, and it fell, and great was the fall of it.

Matthew 7:24-27

Moving Forward to Secure the Future

If you can't fly, then run,
if you can't run, then walk,
if you can't walk, then crawl,
but whatever you do,
you have to keep *moving forward*.

— *Martin Luther King Jr.*



Strategic Goals



Participant Engagement

Change participant behavior to measurably improve retirement readiness and lifelong well-being.



Benefits

Optimize benefit plans to balance the common good of participants and plan sponsors, while meeting our fiduciary obligations and U.S. church needs.



Organizational Effectiveness

Become best-in-class financial services agency that invests in people, technology and process discipline to create excellent customer experiences.



Growth

Grow revenue by serving similar values-based organizations to improve our ability to serve our mission.



Central Conferences

Evaluate and activate opportunities to advance the vitality of the global Church through Central Conference benefits and services.

Participant Engagement



**Change participant behavior
to measurably improve
retirement readiness and
lifelong wellness.**

Benefit Plans



Optimize benefit plans to balance the common good of participants and plan sponsors, while meeting our fiduciary obligations and U.S. church needs.

- Wespath has a duty to care for those who have served the Church
- We need to serve current retirees and those near retirement for many years



Organizational Effectiveness



Become best-in-class financial services agency that invests in people, technology and process discipline to create excellent customer experience.



Technology



Processes



People

Growth



Grow revenue by serving similar values-based organizations to improve our ability to serve our mission.



Central Conferences



Evaluate and activate opportunities to advance the vitality of the global Church through Central Conference benefits and services.



Retirees and surviving spouses of the Hundred Islands Conference in Alaminos City, Philippines



Reverend Sanchez

Conversations in the Philippines identified a need for continued support of the Central Conference Pensions.

Thank You for Advising Us!

Thank you to the members of the Conference Benefits Officers Advisory Board.



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|-------------------------|----------------------------|
| Woody Bedell | Northern Illinois |
| Larry Davis | Memphis |
| Jo Fielding | Eastern Pennsylvania |
| John Fuller | Virginia |
| Bruce Galvin | Pacific Northwest & Alaska |
| Noreen Keleshian | Rocky Mountain |
| Jodi Smith | North Texas |

Securing Our Future



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We care for those who serve by providing investment and benefit services that honor the mission and principles of The United Methodist Church.



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