

Conference Forum AGENDA
March 15-16, 2018

Thursday, March 15:

7:30 – 8:30	Breakfast	
8:30 a.m.	Welcome, Announcements / Introductions <i>Wespath</i>	<i>Ross Lundstrom and Anne Green,</i>
	Opening Devotion	<i>The Reverend David L. Anderson,</i> <i>South Carolina Conference</i>
8:50 a.m.	Opening Address “Caring for those who serve, by securing our future” <i>Strategic Plan Video</i>	<i>Bill Kavanaugh, Wespath</i>
9:15	UMC Responses to the Future <ul style="list-style-type: none">• Apportionment Sustainability Study <i>Conference</i>• Conference Planning Efforts <i>Conference and Christine Dodson, North Carolina Conference</i>• Securing Benefit Assets Update	<i>Bill Brownson, West Ohio</i> <i>David Stotts, Mississippi</i> <i>Jim O’Connell, Wespath</i>
10:15	Break	
10:30	Church and Policy Changes	<i>Andy Hendren, Wespath</i>
11:15	Moving Expense Tax Law Change	<i>Andy Hendren, Wespath</i>
11:45 a.m.	Lunch	
1:00 – 1:45	<i>Wespath Agency Video</i> Plan Design Update	<i>Steve Clark, Wespath</i>
1:45	Transition to Breakout Sessions	
1:55	Breakout Sessions: <ul style="list-style-type: none">• Securing your Investments <i>Wespath</i>• Moving Expense Reimbursement <i>Wespath</i>• Conference procedures for church departures <i>Conference and Christine Dodson, North Carolina Conference</i>• Securing our Future – Benefits Administration	<i>Dave Zellner and Kirsty Jenkinson,</i> <i>Steve Clark and Jim O’Connell,</i> <i>David Stotts, Mississippi</i> <i>Ann Mueller, Wespath</i>
2:50 – 3:00	Breakout Transition Time	
3:00 - 3:55	Breakout Sessions Repeat: <ul style="list-style-type: none">• Securing your Investments <i>Wespath</i>• Moving Expense Reimbursement <i>Wespath</i>• Conference procedures for church departures <i>Conference and Christine Dodson, North Carolina Conference</i>• Securing our Future – Benefits Administration	<i>Dave Zellner and Kirsty Jenkinson,</i> <i>Steve Clark and Jim O’Connell,</i> <i>David Stotts, Mississippi</i> <i>Ann Mueller, Wespath</i>
3:55	Transition to General Session	
4:10	<i>Events Video – Participant Reflections</i> 2017 Engagement Efforts Update	<i>Martin Bauer, Wespath</i>
4:30	Auto Features	<i>Steve Clark, Wespath</i>
5:00	Securing our Future—Data Accuracy and Efficiency <ul style="list-style-type: none">• One Pastor’s Experience <i>Baltimore-Washington Conference</i>• Data Accuracy and Efficiency	<i>The Reverend Cary James,</i> <i>Ross Lundstrom and Eileen Kane, Wespath</i>
5:45 p.m.	End of Day	

Friday, March 16

7:30 – 8:30	Breakfast	
8:30	Opening Devotion	<i>The Reverend Cary James, Baltimore-Washington Conference</i>
8:45	Announcements	<i>Ross Lundstrom and Anne Green, Wespeth</i>
	<ul style="list-style-type: none"> • Recognition of Retirements • AUMCPBO • NAACT 	<i>Woody Bedell, Northern Illinois Conference</i> <i>Ross Williams, New York Conference</i>
8:55	Securing our Future – Data and Accounts	<i>Eileen Kane, Wespeth</i>
9:30	Organizational Effectiveness	<i>Helen Exarhakos, Wespeth</i>
10:00	Table Top Conversation and Discussion	
10:15	Break	
10:30	Securing our Future – Investment Growth Strategy	<i>Bill Kavanaugh and Dave Zellner,</i>
	<i>Wespeth</i>	
11:00	Securing our Current Benefit Obligations	<i>Fred Hyland and Luba Levine,</i>
	<i>Wespeth</i>	
11:50	<i>Mike Baughman Video</i>	
	Reflections and closing remarks	<i>Bill Kavanaugh</i>
12:00	Event ends (Box Lunches)	

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