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Our records indicate you are eligible to retire at the next annual conference session. Whether you plan to retire now or later, take steps to prepare.



### 1. Verify Your Personal Information and Beneficiaries

You may miss important communications if you move or change your phone number or e-mail address. It's also important to verify beneficiaries—and their contact information—so that Wespath knows how to distribute your account balances and/or death benefits.

[Review and update personal information on Benefits Access](#)—Log in and go to **Profile > Personal Information Summary**.

[Review and update beneficiaries on Benefits Access](#)—Log in and go to **Profile > Manage Beneficiaries**.



### 2. Verify Your Spousal Information and Service Record

Errors in your spousal information or service record could result in inaccurate benefit projections or payments.

[Review your spousal information on Benefits Access](#)—Log in and go to **Profile > Personal Information Summary**. Contact the Wespath Retirement team at **1-800-883-4078** to make updates.

[Review your service on Benefits Access](#)—Log in and go to **Profile > Service and Compensation**. Contact your conference office to correct any errors immediately to prevent a delay in benefit payments.



### 3. Update Your LifeStage Personal Investment Profile

LifeStage Investment Management invests your defined contribution account based on your Personal Investment Profile. Review your risk tolerance and, if you have a Ministerial Pension Plan (MPP) account balance, verify your **“Expected Benefits Commencement Date”**—the date you plan to begin your lifetime benefit payments.

[Review your LifeStage profile on Benefits Access](#)—Log in and go to **Accounts > LifeStage Investments Options > Change LifeStage Personal Investment Profile**.



### 4. Project Your Retirement Income

Wespath offers three online planning tools: Retirement Benefits Projection, Retirement Readiness Tool, and the LifeStage Retirement Income Calculator. Read about these tools [here](#).

[Project your retirement income on Benefits Access](#)—Log in and go to **Learn > Retirement Benefits Projections**.



### 5. Ask About Retiree Health Benefits

Health care costs can be a significant factor in your retirement planning. You may want to speak to your conference benefits officer regarding retiree health benefits.



### 6. Get a Comprehensive, Personalized Financial Plan from EY

A planner at [EY Financial Planning Services](#) can help you develop or revise your comprehensive financial plan and help you decide if you are financially prepared for retirement at **no additional cost** to you.\* To get started, call EY at **1-800-360-2539** business days from 8:00 a.m. to 7:00 p.m., Central time.



### 7. Provide Your Retirement Notification

Paragraph 357 of *The Book of Discipline 2016* requires you to notify your bishop, cabinet and board of ordained ministry of your intent to retire at least 120 days prior to your retirement date.

### Need Assistance? Call Wespath!

A Retirement Team Specialist is here to help at **1-800-883-4078**.

*\*Costs for these services are included in Wespath's operating expenses that are paid for by the funds.*

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