



Conference Forum—March 2022



Wespath

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General Conference Response

Where Do We Go From Here?

Paragraph 1504 Still Applies

- ✓ Closure under ¶2549
- ✓ Disaffiliation under ¶ 2553
- ✓ Uniting with another Evangelical Church under ¶2548
- ✓ Otherwise changing in connection with the UMC
- NO** Staying an active UMC congregation

Postponement of General Conference



Possible-~~NEW~~ target
implementation date
for Compass
Retirement Plan

Impact of Surrendering Clergy Credentials

Plan	Active	Retired
Annuity Benefits From All Plans*	Elder, Deacons: Value of annuity converted to account balance and moved to UMPIP Local Pastors/Provisional Members: No conversion; annuity available at age 62	No impact, except no future Pre-82 rate increases after year of withdrawal
CRSP DC and MPP account	Remains as account balance, no additional contributions, moved to UMPIP	No impact
UMPIP (Personal Contributions)	No impact on account balance; may continue to contribute through Wespath arrangement with disaffiliated church	No impact

* [Petition to General Conference to treat elder and local pastor similarly.](#)

Impact of Surrendering Clergy Credentials

Plan	Active	Retired
HealthFlex	Loss of active eligibility (but eligible for 18 months of continuation coverage)	Depends on conference policy; possible loss of eligibility (but might be eligible for 18 months of continuation coverage)
Medicare Marketplace and HRA Program (Via Benefits)	Depends on conference policy; possible loss of eligibility for conference-funded benefits	Depends on conference policy; possible loss of eligibility for conference-funded benefits

Impact of Surrendering Clergy Credentials

Plan	Active	Retired
Disability	Eligibility ends; disability payments continue for disabled clergy already receiving benefits as long as eligibility continues	Not applicable
Death Benefit	Ends one month after withdrawal	No impact; benefit is retained
Other Conference-Provided Benefits	Depends on conference benefit offerings and policies	Depends on conference benefits and policies

Some Thoughts

- COB request for declaratory decision from Judicial Council on whether annual conferences may disaffiliate
- Under current provisions, CRSP pension obligations and assets must remain with the UMC
- Churches that leave UMC, whether individually or as part of a disaffiliating group, will owe pension liability withdrawal payments in accordance with ¶1504.23
- Disaffiliation via ¶2548.2 and a possible comity agreement between annual conference and local churches

Next Steps...



What are you hearing?



What are your concerns?



What are you doing?



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