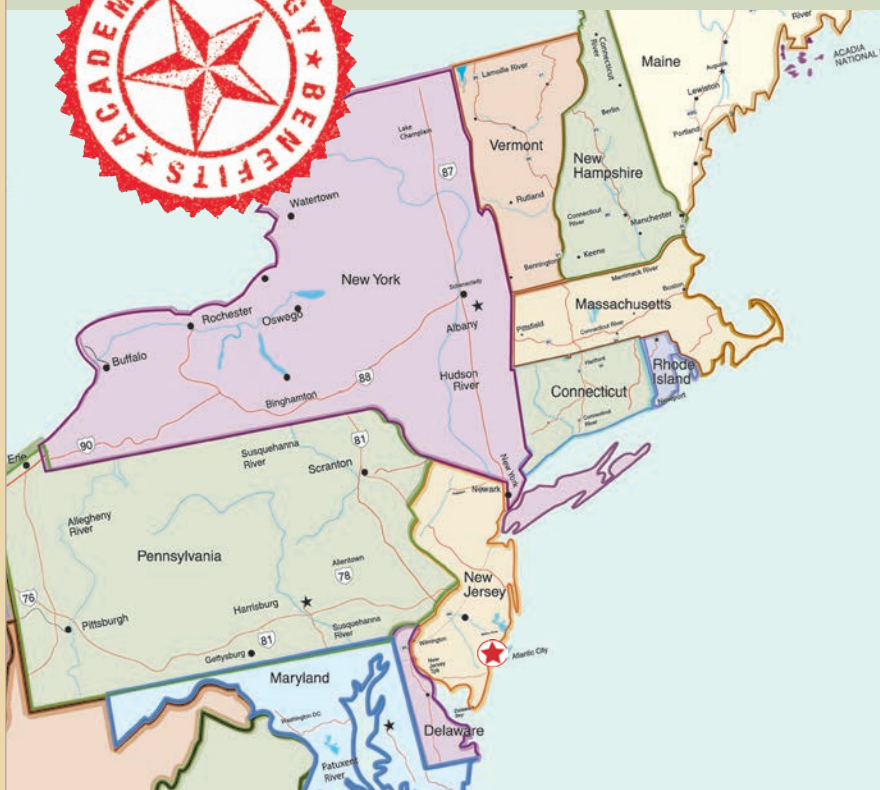


## REGISTRATION AND INFORMATION

# CLERGY BENEFITS ACADEMY

NOVEMBER 18–20, 2013  
GALLOWAY, NEW JERSEY



General Board

**Pension and Health Benefits**

*Caring For Those Who Serve*

## EVENT INFORMATION:

November 18–20, 2013

Monday, November 18	1:00 p.m.	Event Begins
Wednesday, November 20	2:30 p.m.	Event Ends

Please pick up your name badge and registration materials **Monday, November 18** between 11:00 a.m. and 1:00 p.m.

## REGISTRATION INFORMATION

Register now for the early-bird rate of **\$119.00** (\$209.00 with spouse).

Early-bird deadline: **October 11, 2013**

Registration after early-bird ends: **\$149.00** (\$239.00 with spouse)

The event fee includes **breakfast and lunch** on Tuesday and Wednesday, refreshment breaks and Academy materials.

**Please note:** Dinners are at your own expense.

## HOTEL INFORMATION

**Stockton Seaview Hotel**  
401 S. New York Road  
Galloway, New Jersey 08205  
**1-855-894-8698**

Special room rate for Clergy Benefits Academy: **\$99 plus tax per night**

Hotel deadline: **October 11, 2013**—based on availability

**Note:** Making the hotel reservation and paying for hotel accommodations are the attendee's responsibilities. Please tell the hotel that you are attending the Clergy Benefits Academy to obtain the negotiated room rate. **The special room rate will be available until October 11—based on availability.**

## DAY CARE INFORMATION

The General Board of Pension and Health Benefits will provide a 50% discount on an additional hotel room for a child care provider (grandparent, friend, etc.). Call **Anne Green** (1-800-269-2244, ext. 4560) for more details.

## Register Now!

Register online. Go to **www.gbophb.org**, click on **"Events"** and then click on **"Clergy Benefits Academy."**

## CLASS DESCRIPTIONS

Classes are scheduled on a track, so you can attend each session. You will get your track assignment upon arrival. An example of a full agenda is available on the event website.

### Dimes to Dollars: A Savings Plan for You

The United Methodist Personal Investment Plan (UMPIP) is key to enhanced retirement security. Learn how to maximize your saving potential and how to tailor your investments to reflect your needs and personal circumstances. Saving has never been so easy. And don't forget—UMPIP is available to lay staff as well!

**Instructor:** Peter Hang, Benefits Educator, General Board of Pension and Health Benefits

### Healthy You...Healthy Church

Get excited about creating a healthier you—and a healthier church. Nutrition and physical activity—from both an individual and a congregational perspective—will be the focal point of this class. Ever thought about creating an outreach ministry around food or organizing your refrigerator for healthier eating? Come prepared to think about food and physical activity in a new way and walk away with tools you can use!

**Instructor:** Judy Johnston, MS, RD, LD, Research Instructor, Department of Preventive Medicine and Public Health, University of Kansas School of Medicine

### Help! Clergy Tax Laws!

The laws relating to taxation of clergy compensation can be confusing. This class will help you understand your tax liability, the clergy housing allowance, accountable reimbursement plans and other issues unique to clergy. This is a practical class that will focus on the basic issues.

**Instructor:** Amy Hume, CPA, Principal, UHY Advisors TX, LLC

### Planning for the Future: Financial Goals and Tools

Do you have financial goals? Is excessive debt eating away at you? Are you monitoring your spending? This class will discuss tools you can use to plan for a more secure retirement. You'll learn about setting goals, the role of debt, the importance of net worth and other basic financial considerations that will help you plan for retirement security. This class is designed to give you basic tips and tools to improve your financial picture.

**Instructor:** Lynette Rice, CPA, CFP, Benefits Educator, General Board of Pension and Health Benefits

### Planning for the Future: Beyond the Basics

Once you've set your financial goals, how do you use insurance policies, savings programs and our various denominational benefit plans to take your retirement planning to the next level? What preparations are necessary for those transitional moments when your well-thought-out plans go awry? How do you keep your plans for the future moving forward? This class is designed to help you make the most of your financial planning.

**Instructor:** Mark Conner, CFP, CEBS, Benefits Educator, General Board of Pension and Health Benefits

### Planning for the Future: Your Family and Your Estate

Do you have a durable power of attorney or an advanced directive? Do you know where your important documents are located? Have you considered estate planning and your long-term financial legacy? Are you familiar with trusts and estate tax laws? This class is essential as you consider ways to care for your family's future.

**Instructor:** The Reverend David Bell, President and Executive Director, United Methodist Foundation of Michigan and a Senior Design Partner, Design Group International



## Social Security for Clergy

Social Security provides both retirement and disability benefits. Learn how Social Security can benefit you, how you might qualify for benefits and what you may expect from Social Security during different life events.

Instructors: Mark Conner and Lynette Rice, General Board of Pension and Health Benefits

## Unexpected Events: Benefits You Need the Most

What happens when life throws you a curve and you face a difficult situation involving disability or incapacity? Learn how the Comprehensive Protection Plan helps you through unplanned transitions. In this class, you will learn “what to do” and “what to expect” at those times when you and your family need benefits the most.

Instructor: Dale Jones, Managing Director of Education and Plan Sponsor Relations, General Board of Pension and Health Benefits

## United Methodist Pension Benefits Review

The United Methodist Church offers many benefits to its clergy. This class provides an overview of the benefits you and your family may expect from the Church when you retire. The class will focus on the Clergy Retirement Security Program and the Ministerial Pension Plan.

Instructor: Ron Coleman, Conference Liaison, General Board of Pension and Health Benefits

## We Can Do It: Living Healthy and Balanced Lives

Promoting health, in all its forms, is part of our United Methodist heritage, calling and challenge. Yet translating that calling into the daily lives of ourselves, our families and our congregations can be experienced as stressful itself. This class will offer a “check-up and check-list,” based on current clergy research, health promotion trends and a holistic model of wellness. Participants will be enabled to build upon their strengths and recognize areas that need improvement before problems progress. As advocates for health in all its meanings, clergy know their own health speaks the loudest message!

Instructor: The Reverend Ron Johnson, PhD, Pastoral Psychotherapist, Bartlett United Methodist Church Counseling Center, Memphis Annual Conference

## SPECIAL OPPORTUNITIES

Learn more about these special opportunities online: Go to [www.gbophb.org](http://www.gbophb.org), choose “Events” and then click on “Clergy Benefits Academy.”

- Consultation with a General Board of Pension and Health Benefits representative
- Financial Planning Forum
- More...Living a Balanced Life in the Congregation and Connection



Find us on  
**Facebook**

# Clergy of All Ages Are Welcome!

The General Board of Pension and Health Benefits of The United Methodist Church invites all active clergy and spouses to attend the Clergy Benefits Academy.

## There Is Something for Everyone!

By attending the Clergy Benefits Academy, you will:

- learn how to care for your financial, emotional and physical well-being with age-focused coursework;
- gain knowledge and information necessary to make confident decisions about your own personal situation;
- have an opportunity to participate in one-on-one consultations and receive answers to your personal questions from a knowledgeable General Board of Pension and Health Benefits staff member; and
- earn continuing education units (CEUs).

## Earn Education Credits

You will earn 1.5 continuing education units (CEUs) if you complete 10 classes and 1 CEU if you complete seven classes. At event check-in, you will receive a “passport,” which will be stamped at the completion of each class. This passport will help us determine the number of CEUs you should receive for attending the Clergy Benefits Academy.

From past attendees:



**Best use of my time in a long time.**

**Excellent event. Well-planned, with top-notch presenters.**

**I learned new things...**

**and I've been in ministry for many years.**



**Questions about the  
Academy Schedule?**

Call Renee Smith-Edmondson at  
**1-800-269-2244, ext. 4273**

**Questions about Registration,  
Hotel Accommodations or Day Care?**

Call Anne Green at  
**1-800-269-2244, ext. 4560**



**November 18–20, 2013  
Galloway, New Jersey**



General Board

## **Pension and Health Benefits**

*Caring For Those Who Serve*

1901 Chestnut Avenue  
Glenview, Illinois 60025-1604  
1-800-851-2201  
[www.gbphb.org](http://www.gbphb.org)



**25, 30, 40 to 60 ...  
Something for Clergy of All Ages!**