Retirement Planning Resources

There are a variety of resources to assist North Texas Conference clergy and conference employees with planning for retirement:

1. **Wespath Retirement Team**
   Wespath, formerly the General Board of Pension and Health Benefits (GBOPHB), has a Retirement Team which can run retirement projections for prospective retirees and answer questions regarding the retirement process. The Retirement Team can be reached at 1-800-851-2201, Monday – Friday, 8 a.m. to 6 p.m. central time. More information can be found at this link: https://www.wespath.org/retirement-investments/retirement-investment-resources.

2. **Ernst & Young (EY) Financial Planning Services**
   Wespath provides Ernst & Young (now EY) Financial Planning Services *at no charge* to active participants and surviving spouses with an account balance in a Wespath plan and to retired participants with an account balance of at least $10,000. EY's financial planners can provide confidential, professional assistance on a wide range of financial issues such as:
   - Making investment decisions
   - Retirement planning and projections
   - Managing credit card and other debt
   - Understanding tax issues
   - Evaluating insurance needs and options
   - Buying a home or car
   - Saving for your children's college education
   - Estate planning

   EY does not sell any investment or insurance products. Call EY directly at **1-800-360-2539**, Monday through Friday, 8:00 a.m. to 7:00 p.m., Central time. For further information, go to https://www.wespath.org/retirement-investments/retirement-investment-resources/ey-financial-planning-services.

3. **Benefits Access Online Account Services**
   Benefits Access is your online access to your Wespath retirement accounts. Go to https://my.benefitsaccess.org/login to register. Here are directions for setting up your online presence: https://www.wespath.org/assets/1/7/4328.pdf.

   Benefits Access gives you access to:
   - Your Wespath retirement plan account balances, transactions, investment returns and allocations;
   - Retirement Projections – you can get estimates of your retirement funds available at projected retirement dates;
   - Articles on a variety of retirement and financial planning issues under "Learn More;"
   - Electronic delivery of statements and the Wespath publication *Hark*.

4. **NTC Retirement Benefits Seminar**

The North Texas Annual Conference offers a Retirement Benefits Seminar to active clergy and their spouses every year in the fall.

This seminar features presentations from Wespath and EY. Topics include:

- Retirement planning and individual retirement projections
- Social Security
- Clergy tax issues