

UNITED METHODIST CLERGY AND DISAFFILIATION

For up-to-date information on all disaffiliation information, not just clergy related issues:

Wespath: <https://www.wespath.org/about-wespath/wayforwardwespathfaq>
(1-800-851-2201)

North Texas Conference: <https://ntcumc.org/disaffiliation-resources>

Financial Planning

EY can help review how decisions might impact your retirement from a financial planning standpoint.

<https://www.wespath.org/retirement-investments/retirement-investment-resources/ey-financial-planning-services>

Pensions

Clergy withdrawals and pensions under §1360 are outlined.

<https://www.wespath.org/assets/1/7/5861.pdf>

North Texas Retiree Health Reimbursement Account

North Texas Conference Retiree Health Reimbursement Accounts through Via Benefits are outlined in the Conference Policies.

Conference Policies: https://ntcumc.org/North_Texas_Conference_Policies.10.31.22.pdf

- Page 22, quoted here, provides specifics on surrendering credentials.

“14. WITHDRAWAL TO ANOTHER DENOMINATION OR SURRENDER OF CREDENTIALS

Retired clergy who withdraw to another denomination or surrender their credentials will no longer be eligible for the Conference funding through the health reimbursement account at Via Benefits. Loss of funding occurs on the date of withdrawal or surrendering of credentials. The participant will have six months from that date to claim reimbursement for expenses incurred prior to the date of withdrawal or surrendering credentials. The same applies for any non-clergy spouse of a retired clergy withdrawing to another denomination or surrendering credentials. No additional funding will be made available.”