

## 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.03.2022.pdf](https://ntcumc.org/North_Texas_Conference_Policies.03.2022.pdf)

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

“14. SURRENDER OF CREDENTIALS Retired clergy who surrender their credentials will no longer be eligible for the Conference funding through the health reimbursement account at Via Benefits. If there is funding already on account with Via Benefits, it will remain in place until it is gone, but no additional annual funding will be added to the clergy’s account. The same applies for any non-clergy spouse of a retired clergy surrendering credentials. No additional funding will be made available.”