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.

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 http://www.wespath.org/retirement/services/ey/.

3. **Benefits Access Online Account Services**
   Benefits Access is your online access to your Wespath retirement accounts. Go to https://www.benefitsaccess.org/login.aspx to register. You will need your Social Security number and the PIN number which the GBOP mailed you in your initial enrollment packet. If you do not know your PIN, you can request a new one.

   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. The next Retirement Benefits Seminar will be held on November 17, 2016 at the North Texas Conference Ministry Center in Plano. Registration will begin in late September.

This seminar will feature presentations from Wespath and a local CPA. Topics include:

- Retirement planning and individual retirement projections
- Social Security
- Clergy tax issues
- NTC Retiree Health options including OneExchange