

Do you have multiple retirement accounts? How can you account for the time you spend managing them?

ROLL OVER INTO UMPIP AND MAKE IT EASY TO MANAGE YOUR INVESTMENTS

Many people have more than one retirement account. If you are one of them, it's time to consider consolidating your retirement savings. Wespath Benefits and Investments (Wespath) offers an easy way to roll over money from most retirement accounts—including IRAs and prior employer plans—into the United Methodist Personal Investment Plan (UMPIP).

CONSOLIDATE INTO UMPIP

Like most people, you have many important things to do. Simplify your financial life. Roll all your retirement accounts into UMPIP and track your investments online or on a single account statement. Consolidating your accounts makes it easier to:

» **Evaluate your retirement readiness**
(View your entire retirement savings at a glance)

» **Allocate your retirement account investments**
(Instead of having to do so for each retirement account, do it for only ONE)

You can make your life easier by rolling your other investment accounts into UMPIP. All it takes to begin is one phone call to Wespath at **1-800-851-2201**. Need more reasons to roll over to UMPIP? Consider these...

Advantages of keeping your money with Wespath

Beyond Wespath's proven long-term track record, here are some things to consider:

- **Autopilot solutions**—LifeStage Investment Management and LifeStage Retirement Income are offered at no additional cost.¹
- **Comprehensive financial guidance**—EY Financial Planning Services are available at no additional cost.^{1, 2}
- **Clergy housing allowance preservation**—Rollovers out of a Wespath-administered plan may not be eligible for the housing allowance exclusion.

Additional Advantages

- **Sustainable investment**—We promote environmental stewardship, human rights and sound corporate governance to create long-term value.
- **Expenses**—Compare our investing costs with other plans and IRAs.
- **Flexible retiree loans**—Retirees can take a loan from account balances instead of a taxable distribution.
- **Customer-focused approach**—We provide services tailored to your needs.

¹ Costs for EY Financial Planning and LifeStage services are included in Wespath's operating expenses that are paid for by the funds.

² EY Financial Planning Services are available to active participants and surviving spouses with account balances, and to retired and terminated participants with account balances of at least \$10,000.

The investment funds are neither insured nor guaranteed by the U.S. government. For more information about the funds, please see the Investment Funds Description at wespath.org/assets/177/3052.pdf. Historical returns are not indicative of future performance.

To start, call a Wespath

customer service

representative at

1-800-851-2201

business days

between 8:00 a.m. and

6:00 p.m., Central time.





Wespath

BENEFITS | INVESTMENTS

Make the simple move. Roll over into UMPiP.

It's easy to consolidate your retirement assets:

- » Complete Parts 1, 2 and 3 of the *UMPiP Incoming Rollover* form.
- » Include a photocopy of your latest statement(s) for the account(s) you want to roll over into UMPiP.
- » Include a completed distribution form from each of your prior retirement accounts, if required.
- » Return these documents to Wespath, and we'll take it from there. You're on your way to a simpler financial life!

Questions...Need help?

Call Wespath at 1-800-851-2201 business days between 8:00 a.m. and 6:00 p.m., Central time.

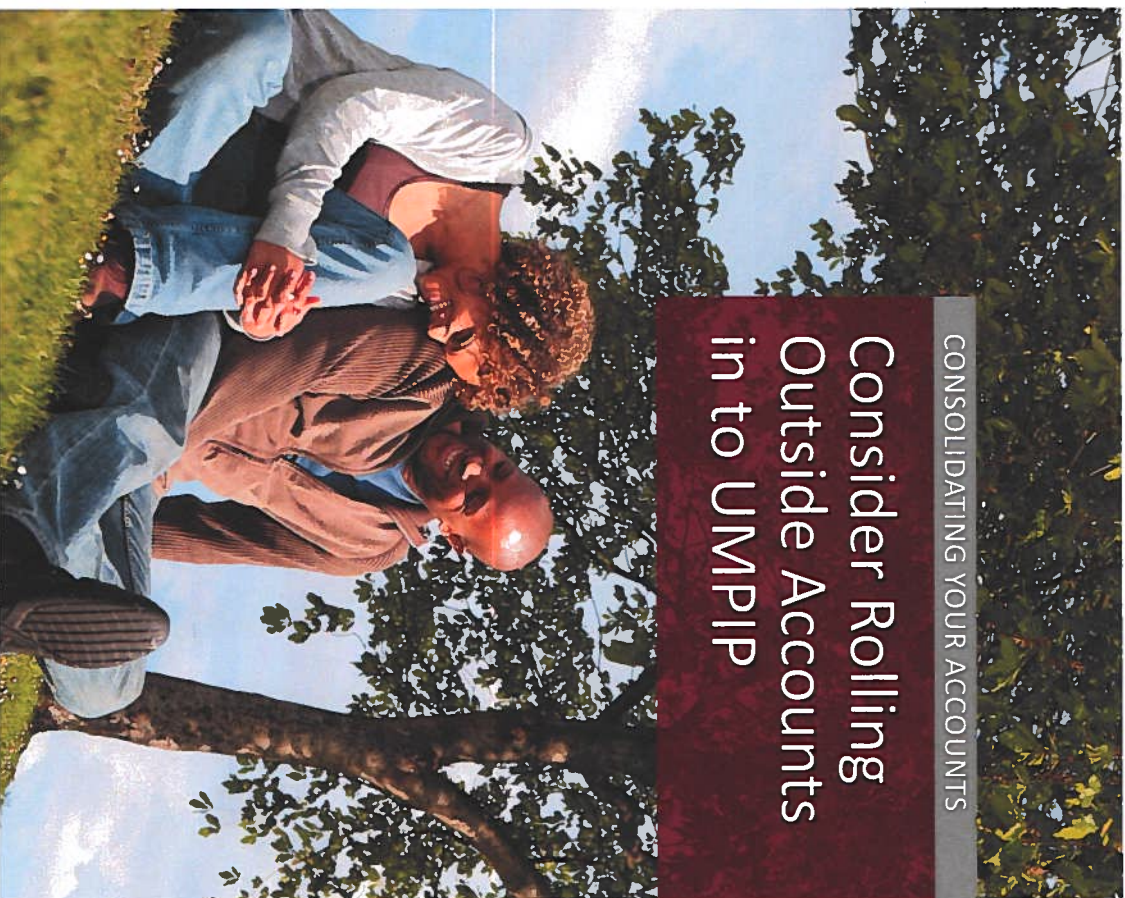


Wespath
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CONSOLIDATING YOUR ACCOUNTS
Consider Rolling
Outside Accounts
in to UMPiP



a general agency of The United Methodist Church