

# United Methodist Personal Investment Plan for Clergy *At-a-Glance*



## Ernst & Young Financial Planning Services

offers valuable investing and financial planning guidance. This program is available to:

- active participants with an account balance,
- surviving spouses with an account balance, and
- retired and terminated participants with an account balance of at least \$10,000.

There is no charge for this program. If you are eligible, just call Ernst & Young directly at **1-800-360-2539** Monday through Friday between 8:00 a.m. and 7:00 p.m., Central time.

The United Methodist Personal Investment Plan (UMPIP) is a retirement plan administered by the General Board of Pension and Health Benefits of The United Methodist Church (General Board)—the largest denominational pension fund in the world. UMPIP is designed to provide one piece of your overall retirement portfolio.

## PLAN FEATURES

- Convenient before-tax and/or after-tax contributions (flat dollar amount or percentage)
- Accepts eligible rollovers from most retirement plans and traditional deductible IRAs
- Plan sponsor may elect to contribute matching contributions or a percentage of your eligible compensation to your account especially for less than full-time clergy who are not covered by the Clergy Retirement Security Program
- Participant directs the investment of both personal and plan sponsor contributions among various investment fund options
- Access to the LifeStage Investment Management Service at no charge
- Hardship loans and withdrawals
- Age 59½ and rollover account withdrawals
- Distribution available upon termination, disability, retirement or death
- Lump-sum, partial lump-sum or cash installment distribution options
- Access to LifeStage Retirement Income, which turns your account balance into monthly payments designed to last your lifetime, at no charge
- On-demand and quarterly account statements
- Access to account information through Benefits Access ([www.benefitsaccess.org](http://www.benefitsaccess.org)) and the Interactive Voice Response (IVR) system
- Participant forms and other information available at [www.gbophb.org](http://www.gbophb.org)
- Representatives available to answer calls at **1-800-851-2201** Monday through Friday from 8:00 a.m. to 6:00 p.m., Central time



General Board

**Pension and Health Benefits**

*Caring For Those Who Serve*