

Pension Enrollment Forms & Information for Lay

The forms needed to enroll in the United Methodist Personal Investment Plan (UMPIP) can be found on the OK Conference webpage: <http://www.okumc.org/pensions>. Follow instructions below and if you have any questions contact: Stephen Mitchell at 1501 NW 24th, Oklahoma City, OK 73106.

Pension Enrollment Form for UMPIP

Please print out & then fill out Part 1 & give to your treasurer/business administration/benefit director so he/she can fill out the remaining sections.

Designation of Beneficiary Forms

Please print out & then fill out Part 1 – 6 for the *Designation of Beneficiary for Retirement Plans*. Under Part 3 check "All Plans". By selecting "All Plans", when you become eligible/participate in other plans offered by the General Board of Pension and Health Benefits (GBOPHB), you will not need to fill out a new Designation of Beneficiary Form. Part 5 should ONLY be filled out if you are married and you want someone other than your spouse as your primary beneficiary (named in Part 4).

Please fill out Part 1 – 5 for the *Designation of Beneficiary for Welfare Plans*. Under Part 2 check "All Plans". By selecting "All Plans", when you become eligible/participate in other plans offered by the GBOPHB, you will not need to fill out a new Designation of Beneficiary Form. Part 4 should ONLY be filled out if you are married and you want someone other than your spouse as your primary beneficiary (named in Part 3).

These original forms must be mailed even if you decide to fax the enrollment form.

Investment Election Form

Please print out & fill out Parts 1 - 5. In order to make a sound decision on which option to choose, LifeStage (Part 3) or self directing your funds (Part 4), refer to the *General Board Investing Opportunities* booklet to see which one is right for you. You will see the risk level of each fund and its performance. If you do not fill this form out at the time that you want to participate, you will be enrolled in LifeStage under the default risk tolerance of moderate, retirement age of 65, qualifying to receive Social Security.

This original form must be mailed even if you decide to fax the enrollment form.

UMPIP Before-Tax/After-Tax Agreement

Please print out & then fill out Part 1 – 4 & give to your treasurer/business administration/benefit director so he/she can fill out the remaining section. You can choose to have funds withheld from your pay & put into your personal pension plan. These funds will be invested in the same account as designated on the *Investment Election Form*. You can choose to have the funds withheld on a Before-Tax basis or an After-Tax basis. Even if you choose not to contribute at all at this time, make that election on the form.

Additional Information

You can also access the CRSP Booklet (English or Spanish), *Summary Plan Documents* for CPP, & the UMPIP Overview. These documents tell you about your benefits under each plan &

how/when you are able to access these funds. The CPP *Benefits Amounts* lists the benefit amounts available for this year under CPP for Death & Disability Benefits.

Once I receive all the enrollment form & get you set up in the system, the Oklahoma Conference will start billing your church for CRSP-DB, DB, CPP & UMPIP (if you choose to participate). Also you will have access to look at your account balances through the GBOPHB's Website www.gbophb.org and clicking on the "OASIS" link.

Treasurer/Benefit Administration/Benefit Director (you are the plan sponsor)

Once you receive these forms from your employee, finish filling out the *Pension Enrollment Form* & sign the *UMPIP Before-Tax/After-Tax Contribution Agreement* & then mail the completed forms to the GBOPHB 1201 Davis Street, Evanston, IL 60201. Make sure that you make a copy of these forms for your personnel files. Do not send forms to the Conference Office as it only delays them getting to the GBOPHB.

12/23/2009

If you have any questions, don't hesitate to ask.

Sincerely,

Stephen Mitchell
Personnel/ Pension Director
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United Methodist Church
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<http://www.okumc.org/pensions>