

## **Pension Enrollment Forms & Information for Clergy**

The forms needed to enroll in the Clergy Retirement Security Program (CRSP), the Comprehensive Protection Plan (CPP) and the United Methodist Personal Investment Plan (UMPIP) can be found on the OK Conference webpage: <http://www.okumc.org/pensions>

Please follow instructions below and mail the forms to Stephen Mitchell at 1501 NW 24th, Oklahoma City, OK 73106 or fax to (405) 524-0750.

### **Clergy Pension Enrollment Form**

Please fill out the form & submit by email or print it out & fax it to the number above or mail it to the address above.

### **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), please 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.

### **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](http://www.gbophb.org) and clicking on the "OASIS" link.

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

Sincerely,  
Stephen Mitchell  
Personnel/ Pension Director  
Oklahoma Conference United Methodist Church  
smitchell@okumc.org  
(405) 530-2063  
<http://www.okumc.org/pensions>

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