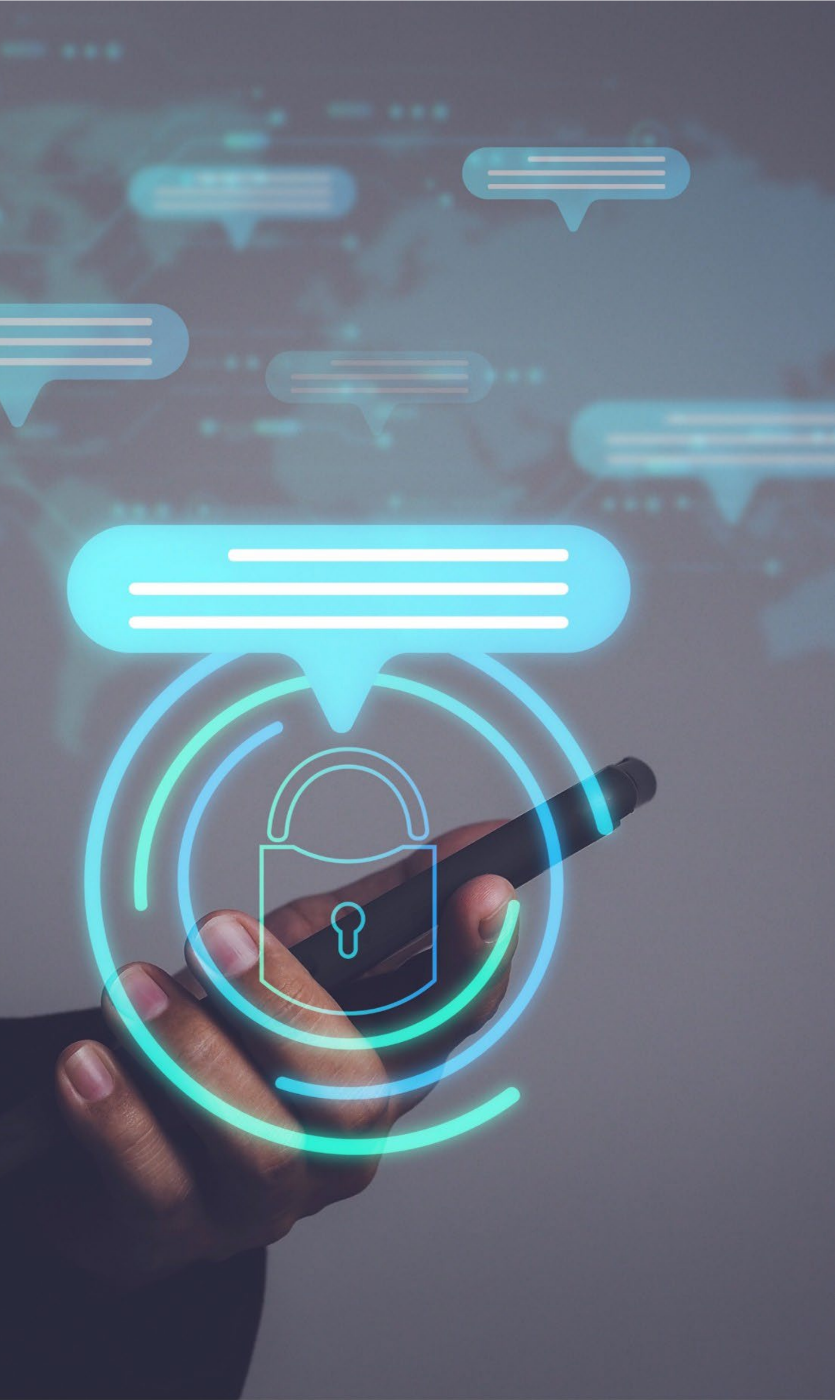
Your Retirement Plan Resources

Explore the tools and support available to help you navigate your retirement benefits with confidence. Learn how to access key information, understand your options and take action when it works for you. Resources highlighted include digital tools, educational materials and opportunities to connect with Benefits Educator.

Wespath



Customer Contact Channels

- Phone Calls
- Secure Messaging via Benefits Access
- Paper Forms

Phone Calls: Statistics

82,598

Calls in 2025

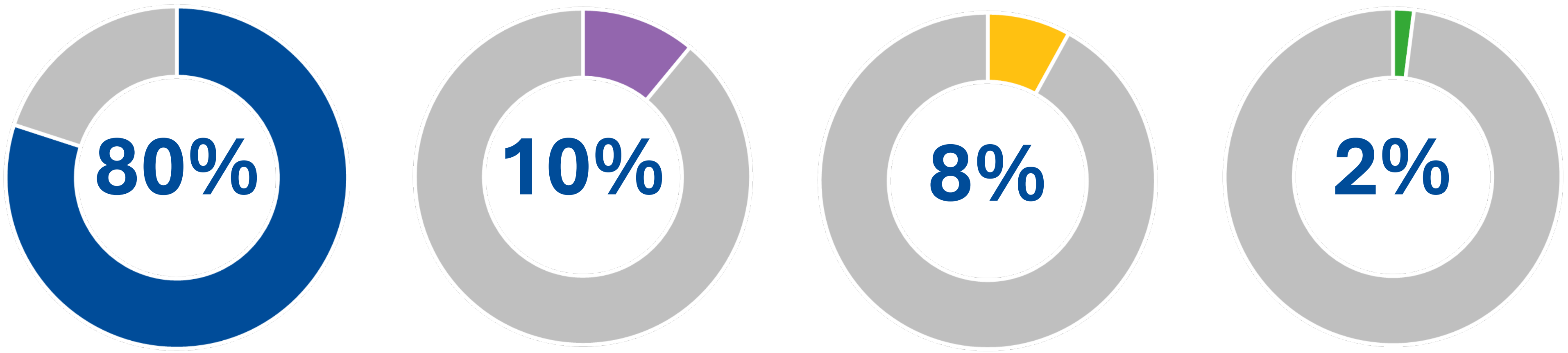
11 minutes

Average handle time

93.74%

Service level

Phone Calls: Caller Breakdown



RETIREMENT BENEFITS

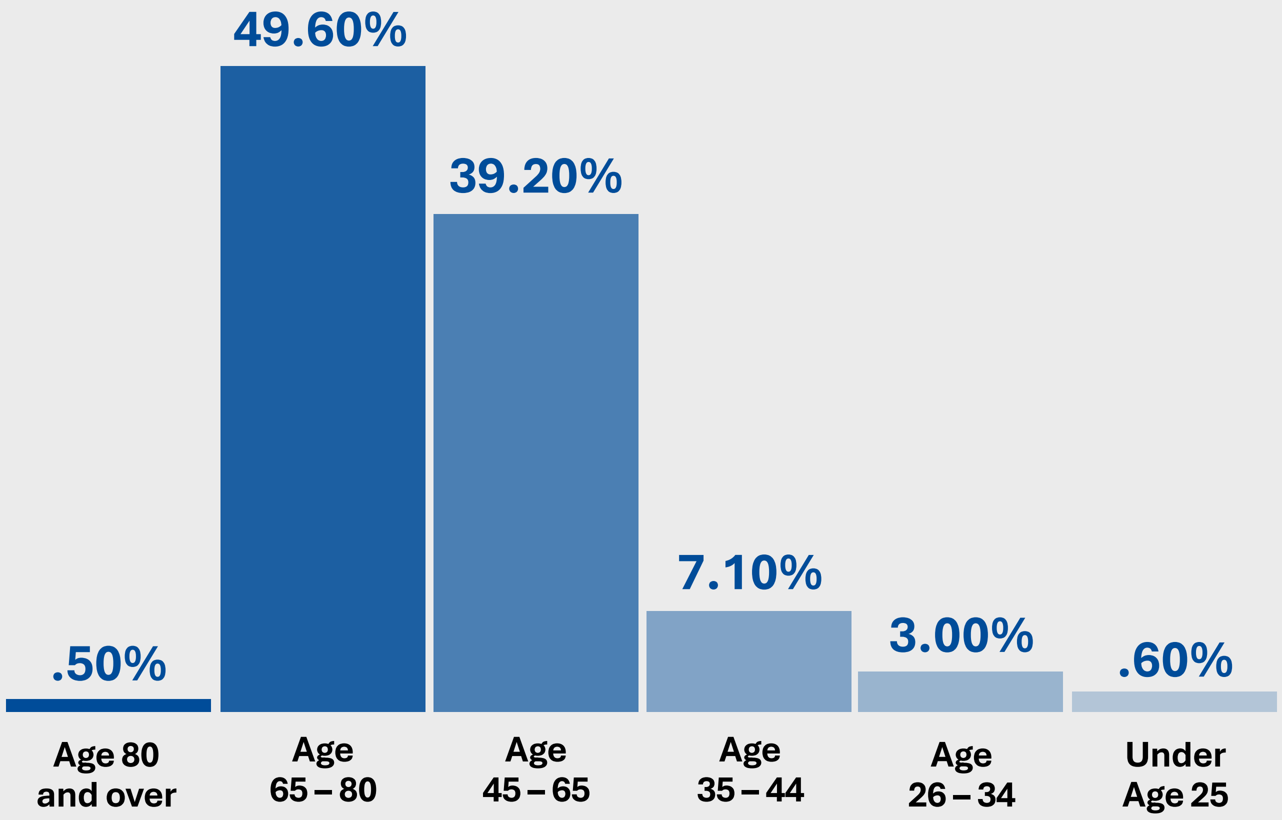
PLAN SPONSOR

HEALTH BENEFITS

SURVIVOR CALLS

Customer Contacts—Participant Demographics

44%	CLERGY
43%	NON-CLERGY
13%	BENEFICIARY



Top 10 Call Reasons

01 Account Balance and Distribution Requests

02 Loan Information and Payoff

03 Beneficiary Updates and Marital Status Changes

04 Retirement Benefits and Projections

05 Health Coverage and Insurance

06 Contribution Elections and Updates

07 Address and Contact Information Updates

08 Tax Forms and Withholding

09 Investment Options and Changes

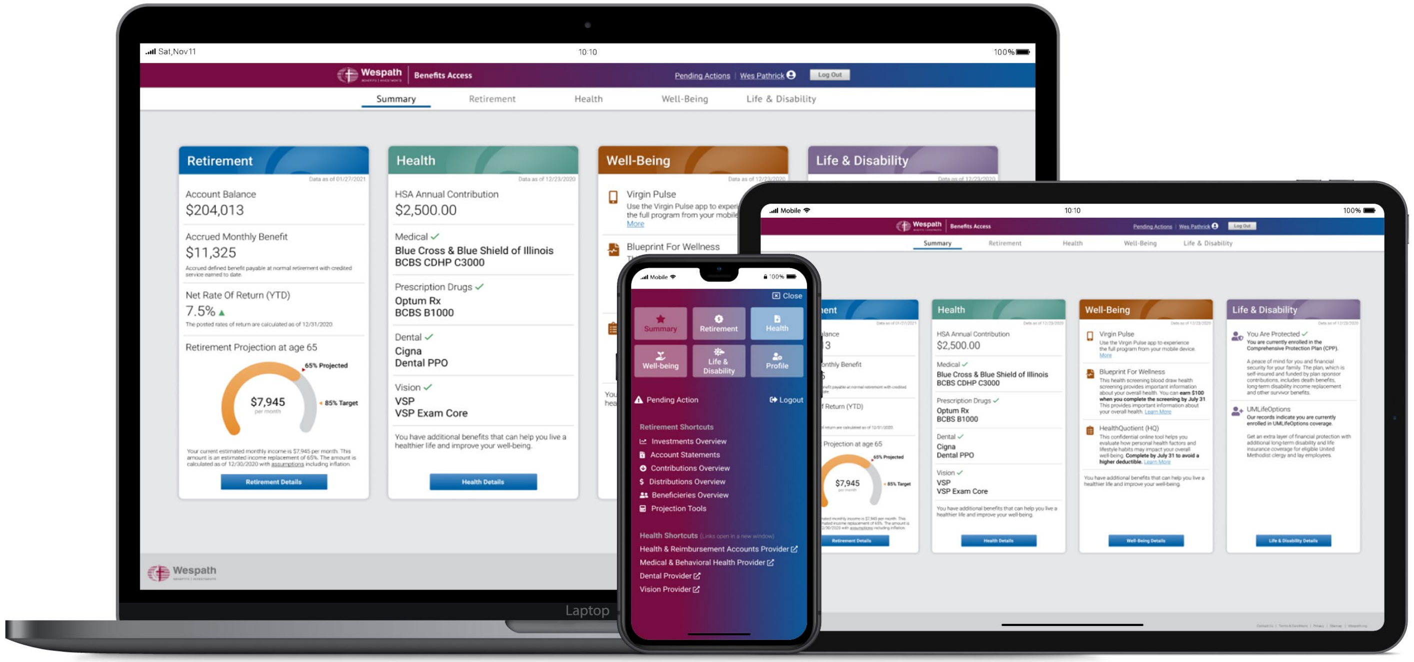
10 Employment Status and Termination

Wespath Participant Solutions
wespath.org
1-800-851-2201

Retirement Team

Benefits Access – benefitsaccess.org

- Review beneficiary information
- Statements and tax information
- Asset allocation
- Benefit Projections
- LifeStage Investment Management Profile
- Compensation and contributions



Benefit Projection

- Normal Retirement Date or next July 1
- MPP – 65% annuity option
- Life & 70% and 2% COLA for annuity options
- Account balances paid through LifeStage Retirement Income
- Contributions will continue with annual conference increase to maximum
- Growth rates on investments

Benefits Access

Your Personalized Retirement Benefits Projection Statement
For Benefits Commencement Date 01/01/2034

Projection

Projections estimate future benefits based on underlying assumptions, which will change from time to time. Actual benefit payments will vary.[1]

Defined Benefit Annuity Lifetime Income

Plan	Projected Monthly Benefit
Clergy Retirement Security Program Defined Benefit (CRSP DB) for 2007 through 2013 service	$698
Clergy Retirement Security Program Defined Benefit (CRSP DB) for 2014 through 2025 service	$824
Ministerial Pension Plan (MPP) Annuity (65%)	$4,912
Subtotal for Defined Benefit Annuity Lifetime Income:	**$6,434**

Defined Contribution Projected Distribution Options

Plan	Projected Lump Sum	Projected Monthly Installments
Ministerial Pension Plan (MPP) (35%)	-	$2,128
Clergy Retirement Security Program Defined Contribution (CRSP DC)	-	$1,387
United Methodist Personal Investment Plan (UMPIP)	-	$5,738
Compass Directed Balance	-	$800
Compass Flexible Balance	-	$944
Subtotal for Account Balance(s):	-	**$10,997**

Understanding the Value of the Projected Amounts

	Projected Lump Sum	Projected Monthly Income
Estimated Total at Retirement:	-	$17,431
Equivalent Value in Today's Dollars:	-	$14,188
Estimated Income Replacement Ratio:	-	86.17%

[1]This Retirement Benefits Projection Statement (Statement) represents an estimate of your benefits assuming that you continue to work or remain under appointment and are covered under the plans until you begin receiving benefits. This estimate is based on the Participant Selected Input and System Determined Input. If actual experience varies from the assumptions (investment return, compensation increases, retirement age, mortality, etc.), the amount of the benefit will differ from the estimate. If the assumptions do not match the requirements of the plan, the plan's provisions will control your benefits eligibility and the amount of your benefit. If you are a terminated clergyperson who has returned to active service, your retirement benefits projection may be inaccurate. For a complete explanation of the calculations used by this Statement, please refer to the *Assumptions and Methodology*.

If you have any questions or concerns regarding your Statement, please call Wespath at **800-851-2201**, Monday through Friday, 8:00 a.m. to 6:00 p.m., Central time, or EY Financial Planning Services at **800-360-2539**, Monday through Friday, 8:00 a.m. to 7:00 p.m., Central time.

Wespath Virtual One-On-One Benefits Education Consultations

Meet one-on-one with a
Wespath Benefits Educator

2026 Consultation Link
wespath.org/r/consults26

EY Financial Planning Services

wespath.eynavigate.com
1-800-360-2539

? How much can I afford for housing in retirement?

? Should I buy or lease a new car?

? Should I make Roth contributions to my retirement plan?

? What is a 529 plan?

? Should I use the loan feature or take a distribution?

wespath.eynavigate.com
1-800-360-2539