

General Conference (April 23–May 3, 2024)

Wespath’s Petitions

Summary of key Wespath petitions approved at General Conference.

Petition # and Name	Petition Summary
<i>Benefit Plans legislation (for U.S. plans)</i>	
Petition 20946-FA: (¶ 1504.1 Compass Plan)	Creates <i>Compass</i> —new account-based mandatory retirement plan for U.S. clergy. <i>Compass</i> will replace the current plan [Clergy Retirement Security Program (CRSP)]. Effective January 1, 2026 .
Petition 20948-FA: (¶ 1504.1 CRSP)	Closes <i>Clergy Retirement Security Program (CRSP)</i> on Dec. 31, 2025 ; transitions U.S. clergy to new <i>Compass</i> plan Jan. 1, 2026. <ul style="list-style-type: none"> Gives clergy in <i>Ministerial Pension Plan (MPP)</i> an <i>option</i> to move 65% account balance to <i>LifeStage Retirement Income (LSRI)</i> instead of annuitizing. <ul style="list-style-type: none"> MPP option available May 10, 2024.
Petition 20949-FA: (¶ 1504.1 RPGA)	Closes <i>Retirement Plan for General Agencies (RPGA)</i> and transfers participants’ accounts to <i>United Methodist Personal Investment Plan (UMPIP)</i> . Also: fully funds legacy DB plans of general agencies and transfers surplus assets to <i>General Agency Benefit Trust (GABT)</i> . Effective January 1, 2025 . <ul style="list-style-type: none"> Does not change benefit amounts that general agencies contribute for their employees.
Petition 20951-FA: (¶ 1504.1 CPP)	Comprehensive Protection Plan (CPP) changes: <ul style="list-style-type: none"> Creates new <i>temporary disability benefit</i> while clergy person’s claim is being evaluated. Temporary benefit is paid by the plan while the claim is being adjudicated (replaces temporary grants from the annual conference). Effective June 1, 2024. Restarts <i>Voluntary Transition Program (VTP)</i> through 2028 for clergy who want to exit ministry. (VTP is <i>not</i> for disaffiliating clergy.) Effective June 1, 2024. Streamlines <i>death benefits</i> to flat dollar amounts. Effective January 1, 2025.
Petition 20947-FA: (¶ 1504.1 Amendment Authority)	Gives Wespath’s Board of Directors <i>limited</i> authority to amend the mandatory benefit plans between General Conferences. Board’s changes cannot reduce benefits, add costs to plan sponsors or participants, or violate Judicial Council rulings or applicable law.



Wespath Services legislation	
Petition 20950-FA: (¶1504.2 Wespath Voluntary Benefit Plans)	Clarifies Wespath’s ability to administer benefit plans and programs for Methodist-affiliated churches, annual conferences, agencies and organizations, such as the African Methodist Episcopal Church, and independent churches with historic Methodist ties and Wesleyan beliefs/traditions.
Petition 20952-FA: (¶ 1504.16 GBPHB Institutional Investors)	Clarifies Wespath’s ability to provide investment management services for Methodist-related churches and organizations that share historic Methodist ties, Wesleyan beliefs/traditions, or missional relationships with The United Methodist Church.
Wespath Governance legislation	
Petition 20945-FA: (¶ 1502.1 GBPHB Membership)	Reduces size of Wespath’s Board of Directors from 32 members to 25, for improved efficiency and cost savings, as well as parity with other general agencies. Does not change Central Conferences representation from current approach (1 seat).
Investment Ethics legislation	
Petition 20982-GA: (¶ 717 Sustainable and Socially Responsible Investments)	<i>Referred</i> to General Council on Finance and Administration. Wespath will partner with GCFA on further steps.
Petition 20770-CA: Readopting ¶4071 Book of Resolutions	Readopts Resolution ¶4071 (Investment Ethics) in <i>The Book of Discipline</i> . Reaffirms commitment to investing in sustainable and socially responsible manner, in alignment with fiduciary duties.
Other Book of Discipline updates	
Petition 20953-FA: (¶ 1505 General Agency Pension Credit)	Removes unnecessary and obsolete wording regarding general agency pension credit; updates wording.
Wespath Governance	
Petition 20213-FA: (¶1501— GBPHB-Wespath Name)	Formally changes “General Board of Pension and Health Benefits” (GBOPHB) name to Wespath throughout <i>Book of Discipline</i> and <i>Book of Resolutions</i> .
Petition 20215-FA: (¶1502.4— Wespath Committees)	Clarifies procedures for claims appeals related to benefits plans; also clarifies committee membership details to comply with State of Illinois law.
Petition 20216-FA: (¶1502.3— Wespath Meetings)	Removes unnecessary language about Board of Directors’ meetings; defers to Wespath’s bylaws regarding meetings.
Central Conference Pensions legislation	
Petition 20224-FA: (¶1504.20— Central Conference Pensions)	Updates description of Wespath’s role related to Central Conference Pensions (CCP) program for clergy in Africa, Philippines, Europe and Eurasia; describes Wespath’s collaboration with other UMC general agencies regarding the CCP program. <ul style="list-style-type: none"> • Does not change Wespath’s responsibilities for CCP program.

Legislative Collaboration	
<p>Petition 20652-FA: (¶¶615, 622, 639 and 818—Proportional Payments)</p>	<p>Removes outdated wording requiring a proportional relationship between conference apportionment of pension and benefit costs and pastors’ salaries. In common practice, annual conferences have not been applying this proportional relationship.</p> <ul style="list-style-type: none"> • Co-submitted in 2019 with National Association of Annual Conference Treasurers (NAACT) and Association of United Methodist Conference Pension Benefits Officers (AUMCPBO).
Book of Discipline clarifications and technical changes	
<ul style="list-style-type: none"> • Petition 20225-FA: (¶1504.21—Health and Wellness Information) • Petition 20648-FA: (new ¶640—Joint Distributing Committee Cross-Reference) • Petition 20265-FA: (¶715.4.d—General Agency Benefit Funding Plan Report) • Petition 20226-FA: (¶1504.8—Cost Allocation of Mandatory Plans) 	<p>Clarifies wording and makes other technical changes to select paragraphs in <i>The Book of Discipline</i>.</p>
Move paragraphs in Book of Discipline	
<ul style="list-style-type: none"> • Petition 20230-FA: (¶1506—Move Pension Duties and Responsibilities of Annual Conferences Discipline ¶1506 and ¶639) • Petition 20231-FA: (¶1507 and ¶639—Financing Pension and Benefit Programs) • Petition 20232-FA: (¶1508 and ¶639—Conference Pension Conflict of Interest Policies) 	<p>Moves the location of select paragraphs in <i>The Book of Discipline</i> from their current location (¶1500s: Wespith section) to ¶1600s: Annual Conferences section.</p> <ul style="list-style-type: none"> • These paragraphs describe responsibilities related to annual conference boards. The petitions to move these paragraphs did not change the paragraphs’ wording or intent.
Request to Withdraw	
<p>Petition 20701-FA: Pension Matters for Disaffiliation by U.S. Annual Conferences or Groups of Local Churches (create new <i>Discipline</i> ¶2555)</p>	<p><i>This 2020 petition is no longer relevant due to four-year postponement of General Conference and disaffiliations completed 2020–2023 under existing ¶2553.</i></p> <ul style="list-style-type: none"> • NOTE: Assessment of disaffiliation liabilities continues under ¶1504.23 for any local church that changes its conference relationship—for example, through closure.