

Agenda (Subject to Change) Quadrennial Benefits Conferences – 2016

Thursday Afternoon Plenary

1:00 Welcome
Worship

*Brad Laurvick – Highlands UMC (Denver)
James Preston – Kingswood UMC (Chicago)*

General Secretary's Opening Address

Barbara Boigegrain

Church Plans and UMC Plans – Past, Present, and Future

Andy Hendren

- Key Differences from ERISA Plans
- Possible Church Plan Legislation or Judicial Decisions
- GC2016 and UMC Plans

2:45 Break

Thursday Afternoon Sections

3:00 Assigned Classes Based on Position, Role, and Tenure

1) Financial and Benefits Leadership

Facilitator: Ross Lundstrom

Benefits Officers
Conference Treasurers
Conference Board of Pensions Chairs
Experienced Conference Board Members

2) UMC Benefits and the Conference Board of Pensions

Facilitator: Terry Shoemaker

New and Relatively New Conference Board of Pensions Members

3) Benefits Issues and Considerations for Cabinets

Facilitator: Ross Lundstrom

District Superintendents
Assistants to the Bishop
Board of Ordained Ministry Staff
Other Cabinet Members

4) Systems and Processes for Conference Benefits Staff

Facilitator: Paula Whitbeck

Benefits and Financial Staff not listed in 1) above

5:45 Sections Adjourn for the Day

6:00 Dinner (Included with Registration)

Friday Morning

7:30 – 8:30 Breakfast

8:30 Classes from Thursday Afternoon Sections Continue

- 1) Financial and Benefits Leadership
- 2) UMC Benefits and the Conference Board of Pensions
- 3) Benefits Issues and Considerations for Cabinets
- 4) Systems and Processes for Conference Benefits Staff

12:30 Lunch

Friday Afternoon – Breakout Sessions by Topic

1:45 Choose One Class from these Four Options

- 1) Policies and Practices to Keep You Out of Court
- 2) Socially Responsible and Sustainable Investment Strategies, Positive Social Purpose Lending
- 3) Recruiting and Developing Effective Conference Board Members
- 4) Benefits Education: Services and Support for Participants

Steve Clark

Kirsty Jenkinson

Wendy McCoy, Florida Conference

Peter Hang

2:45 Choose One Class from the Four Options Above

3:35 Break

3:50 Choose One Class from these Five Options

- 1) Wespeth Investment Management – Investment Basics
- 2) EY Financial Planning – Services and Opportunities
- 3) Joint Committee on Medical Leave
- 4) Well-Being to Sustain the Connection
- 5) Tax Issues for Clergy and Churches

Mike Lohmeier

Gina Gurguolo

Carrie Persivale

Leah Holzwarth

*Nate Berneking,
Missouri Conference*

4:50 Choose One Class from Five Options Above

5:45 Adjourn for the Day

Dinner – On Your Own

Saturday Morning

7:30 – 8:30 Breakfast

8:30 Announcements

Anne Green

8:35 Board Chair's Address

Bishop Robert Schnase

9:10 Economic and Investment Outlook

Dave Zellner

9:55 U.S. Benefits Trends and Outlook

Bill Gulliver, Willis Towers Watson

11:00 UMC Trends and Scenarios: Key Questions/Considerations

Dale Jones

- Future Clergy Workforce?
- Future Structure / Governance of the UMC?
- What Benefits will be Appropriate and Sustainable?

11:15 Sending Forth

11:20 Event Adjourns