

**Clergy Benefits Academy
Broomfield, Colorado
November 11-13, 2020**

Wednesday, November 11, 2020

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| 11:00 – 1:00 p.m. | Onsite Registration |
| 1:00 – 1:45 p.m. | Welcome and Wespeth Opening Session |
| 1:45 – 2:30 p.m. | Worship and Communion with revitup! Attendees |
| 2:45 – 3:45 p.m. | Class Session <ul style="list-style-type: none">• Benefits Access! |
| 3:45 – 4:00 p.m. | Break |
| 4:00 – 5:30 p.m. | Class Session Series 1 <ul style="list-style-type: none">• United Methodist Pension Benefits Review• Help! Clergy Tax Laws• When There's a Will, There's a Way |
| 5:35 p.m. | Break for the Day – Dinner on Your Own |

Thursday, November 12, 2020

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| 6:00– 8:30 a.m. | Breakfast (provided for all - at your leisure) |
| 8:30 – 10:00 a.m. | Class Session Series 1 continues <ul style="list-style-type: none">• Help! Clergy Tax Laws• When There's a Will, There's a Way• United Methodist Pension Benefits Review• <i>Clergy Spouse Class</i> |
| 10:00 – 10:20 a.m. | Break |
| 10:20 – 11:50 a.m. | Class Session Series 1 continues <ul style="list-style-type: none">• When There's a Will, There's a Way• United Methodist Pension Benefits Review• Help! Clergy Tax Laws• <i>Clergy Spouse Class</i> |
| 11:50 – 1:15 p.m. | Lunch (provided for all) |
| 1:15 – 2:30 p.m. | Class Session Series 2 <ul style="list-style-type: none">• Creating Life Balance – Avoiding Compassion Fatigue• United Methodist Benefits Review #2• Social Enterprise in the Church Setting |
| 2:30 – 2:50 p.m. | Break |
| 2:50 – 4:05 p.m. | Class Session Series 2 <ul style="list-style-type: none">• Social Enterprise in the Church Setting• Creating Life Balance – Avoiding Compassion Fatigue• United Methodist Benefits Review #2• <i>Clergy Spouse Class</i> |
| 4:05 – 4:25 p.m. | Break |
| 4:25 – 5:40 p.m. | Class Session Series 2 continued <ul style="list-style-type: none">• United Methodist Benefits Review #2• Social Enterprise in the Church Setting• Creating Life Balance – Avoiding Compassion Fatigue• <i>Clergy Spouse Class</i> |
| 5:40 p.m. | Break for the Day – Dinner on Your Own |

Friday, November 13, 2020

7:00 – 8:30 a.m. **Breakfast (Provided for all - at your leisure)**

8:30 – 9:45 a.m. **Choice Sessions**

- Sharing Church Finances with Narrative Budgets
- Understanding the Confusing World of HealthCare
- Getting Real About Money
- Transitioning to Retirement: The Personal Side
- Going Green: Practical Tips and Ideas

10:05 – 11:20 a.m. **Choice Sessions**

- Sharing Church Finances with Narrative Budgets
- Understanding the Confusing World of HealthCare
- Getting Real About Money
- Transitioning to Retirement: The Personal Side
- Keeping Benefits Secure in a Season of Uncertainty

11:20 – 12:15 p.m. Lunch

12:15 – 1:30 p.m. **Choice Sessions**

- Sharing Church Finances with Narrative Budgets
- Understanding the Confusing World of HealthCare
- Getting Real About Money
- Transitioning to Retirement: The Personal Side
- Keeping Benefits Secure in a Season of Uncertainty

1:30 p.m. **Event Concludes**

No Social Security presentation offered – only an informational brochure at the resource table.

PLEASE NOTE:

- You will be assigned a class track during the onsite registration process.
- Personal Consultations are on-going throughout the event. You can sign-up for the consults during the onsite registration process on Wednesday, November 11.
 - **Benefits Consultations** – a pension projection is provided as part of the registration process. This is an opportunity to meet with a Wespath representative to review the projection and to make changes to your personal contribution amounts, beneficiaries, investment allocations, etc. (25-minute sessions)
 - **Care and Counseling Sessions** for Individuals and/or Couples (45-minute sessions)