## Clergy Benefits Academy Oklahoma City, Oklahoma February 17-19, 2020

February 17-19, 2020		
Monday, February 17, 2020		
11:00 – 1:00 p.m.	Onsite Registration	Grand Ballroom Foyer
1:00 – 2:30 p.m.	Welcome and Opening Session	Grand Ballroom D-F
2:45 – 3:45 p.m.	Class Session	Grand Ballroom D-F
·	Benefits Access!	
3:45 – 4:00 p.m.	Break	
4:00 – 5:30 p.m.	Class Sessions	
·	<ul> <li>United Methodist Pension Benefits Review</li> </ul>	Centennial Ballroom
	Help! Clergy Tax Laws	Grand Ballroom A-C
	When There's a Will, There's a Way	Crystal Room
5:35 p.m.	Break for the Day – Dinner on Your Own	
Tuesday, February 1	18. 2020	
6:00– 8:30 a.m.	Breakfast (provided for all - at your leisure)	Grand Ballroom D-F
8:30 – 10:00 a.m.	Class Sessions	Crana Dameson D
	Help! Clergy Tax Laws	Grand Ballroom A-C
	When There's a Will, There's a Way	Crystal Room
	United Methodist Pension Benefits Review	Centennial Ballroom
	Optional: Healthy Transitions for Clergy Spouses	Continental Room-14th floor
10:00 – 10:20 a.m.	Break	
10:20 – 11:50 a.m.	Class Sessions	
	<ul><li>When There's a Will, There's a Way</li></ul>	Crystal Room
	United Methodist Pension Benefits Review	Centennial Ballroom
	Help! Clergy Tax Laws	Grand Ballroom A-C
	Optional: Healthy Transitions for Clergy Spouses	Continental Room-14th floor
11:50 – 1:15 p.m.	Lunch (provided for all)	
1:15 – 2:30 p.m.	Class Sessions	
·	Chill n Refill	Crystal Room
	Unexpected Events: Benefits You need the Most	Centennial Ballroom
	<ul> <li>Making a Difference: Personal Savings and</li> </ul>	Grand Ballroom A-C
	Wespath Services	
2:30 – 2:50 p.m.	Break	
2:50 – 4:05 p.m.	Class Sessions	
	<ul> <li>Unexpected Events: Benefits You need the Most</li> </ul>	Centennial Ballroom
	<ul> <li>Making a Difference: Personal Savings and</li> </ul>	Grand Ballroom A-C
	Wespath Services	
	Chill n Refill	Crystal Room
	<ul> <li>Optional: Sabbath Rhythms for Clergy Spouses</li> </ul>	Continental Room-14th floor
4:05 – 4:25 p.m.	Break	
4:25 – 5:40 p.m.	Class Sessions	
	<ul> <li>Making a Difference: Personal Savings and</li> </ul>	Grand Ballroom A-C
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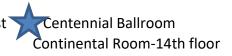
Crystal Room

**Wespath Services** 

• Chill n Refill

Unexpected Events: Benefits You need the Most

Optional: Sabbath Rhythms for Clergy Spouses



5:40 p.m. **Break for the Day – Dinner on Your Own** 

## Wednesday, February 19, 2020

6:00 – 8:30 a.m. Breakfast (Provided for all - at your leisure) Grand Ballroom D-F

8:30 – 9:45 a.m. **Choice Sessions** 

 Securing Benefits in a Season of Change - Wespath Benefits Proposals Centennial Ballroom

Here's to a Healthier You!
 Balinese Room

Overseeing Church Finances – Narrative Budgets Grand Ballroom A-C

Understanding the Confusing World of HealthCare Continental Room-14th floor

Getting Real About Money – Financial Goals & Planning Crystal Room

Transitioning to Retirement – The Personal Side Founders Room-14th floor

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

 Securing Benefits in a Season of Change - Wespath Benefits Proposals Centennial Ballroom

Here's to a Healthier You!
 Balinese Room

Overseeing Church Finances – Narrative Budgets Grand Ballroom A-C

Understanding the Confusing World of HealthCare Continental Room-14th floor

Getting Real About Money – Financial Goals & Planning Crystal Room

Transitioning to Retirement – The Personal Side Founders Room-14th floor

11:20 – 12:30 p.m. **Lunch (provided for all)** 

12:30 – 1:45 p.m. **Choice Sessions** 

 Securing Benefits in a Season of Change - Wespath Benefits Proposals Centennial Ballroom

Here's to a Healthier You!
 Balinese Room

Overseeing Church Finances – Narrative Budgets Grand Ballroom A-C

• Understanding the Confusing World of HealthCare Continental Room-14th floor

Getting Real About Money – Financial Goals & Planning Crystal Room

• Transitioning to Retirement – The Personal Side Founders Room-14th floor

1:45 p.m. **Event Concludes** 

**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 Monday, February 17.
  - Benefits Consultations a pension projection is provided as part of the registration process.
     This is an opportunity to review the projection and to make changes to your personal contribution amounts, beneficiaries, investment allocations, etc. (25-minute sessions)
  - Pastoral Counseling Consultations for Individuals and/or Couples (45-minute sessions)