



















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

**Monday, February 17, 2020**

11:00 – 1:00 p.m.	<b>Onsite Registration</b>		<b>Grand Ballroom Foyer</b>
1:00 – 2:30 p.m.	<b>Welcome and Opening Session</b>		Grand Ballroom D-F
2:45 – 3:45 p.m.	<b>Class Session</b>		Grand Ballroom D-F
	<ul style="list-style-type: none"> <li>• Benefits Access!</li> </ul>		
3:45 – 4:00 p.m.	<b>Break</b>		
4:00 – 5:30 p.m.	<b>Class Sessions</b>		
	<ul style="list-style-type: none"> <li>• <b>United Methodist Pension Benefits Review</b> </li> <li>• Help! Clergy Tax Laws </li> <li>• When There's a Will, There's a Way </li> </ul>		Centennial Ballroom Grand Ballroom A-C Crystal Room
5:35 p.m.	<b>Break for the Day – Dinner on Your Own</b>		

**Tuesday, February 18, 2020**

6:00– 8:30 a.m.	<b>Breakfast (provided for all - at your leisure)</b>		<b>Grand Ballroom D-F</b>
8:30 – 10:00 a.m.	<b>Class Sessions</b>		
	<ul style="list-style-type: none"> <li>• Help! Clergy Tax Laws </li> <li>• When There's a Will, There's a Way </li> <li>• United Methodist Pension Benefits Review </li> <li>• <i>Optional: Healthy Transitions for Clergy Spouses</i></li> </ul>		Grand Ballroom A-C Crystal Room Centennial Ballroom Continental Room-14th floor
10:00 – 10:20 a.m.	<b>Break</b>		
10:20 – 11:50 a.m.	<b>Class Sessions</b>		
	<ul style="list-style-type: none"> <li>• When There's a Will, There's a Way </li> <li>• United Methodist Pension Benefits Review </li> <li>• Help! Clergy Tax Laws </li> <li>• <i>Optional: Healthy Transitions for Clergy Spouses</i></li> </ul>		Crystal Room Centennial Ballroom Grand Ballroom A-C Continental Room-14th floor
11:50 – 1:15 p.m.	<b>Lunch (provided for all)</b>		
1:15 – 2:30 p.m.	<b>Class Sessions</b>		
	<ul style="list-style-type: none"> <li>• Chill n Refill </li> <li>• Unexpected Events: Benefits You need the Most </li> <li>• Making a Difference: Personal Savings and Wespeth Services </li> </ul>		Crystal Room Centennial Ballroom Grand Ballroom A-C
2:30 – 2:50 p.m.	<b>Break</b>		
2:50 – 4:05 p.m.	<b>Class Sessions</b>		
	<ul style="list-style-type: none"> <li>• Unexpected Events: Benefits You need the Most </li> <li>• Making a Difference: Personal Savings and Wespeth Services </li> <li>• Chill n Refill </li> <li>• <i>Optional: Sabbath Rhythms for Clergy Spouses</i></li> </ul>		Centennial Ballroom Grand Ballroom A-C Crystal Room Continental Room-14th floor
4:05 – 4:25 p.m.	<b>Break</b>		
4:25 – 5:40 p.m.	<b>Class Sessions</b>		
	<ul style="list-style-type: none"> <li>• Making a Difference: Personal Savings and Wespeth Services </li> <li>• Chill n Refill </li> </ul>		Grand Ballroom A-C Crystal Room

- Unexpected Events: Benefits You need the Most  Centennial Ballroom
- *Optional: Sabbath Rhythms for Clergy Spouses* Continental Room-14th floor

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)