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Suggested Title: Mandatory Plans and New Clergy Defined Contribution Retirement Plan

Discipline ¶: 1504.1

General Church Budget Implications: None

Global Implications: None

Amend ¶1504.1 as follows:

¶ **1504. Authorizations**—The General Board of Pension and Health Benefits is authorized and empowered to provide administrative, trust, and investment support to The United Methodist Church and its constituent boards, agencies, conferences, organizations, and other institutions in their efforts to provide support, relief, and assistance, and pension, welfare, and other benefits for clergy of this denomination, lay workers of the various units of the Church, and their families. Subject to the provisions of ¶ 2506 herein, the general board shall perform its duties and responsibilities in the spirit of the Church’s mandate for inclusiveness and racial and social justice. In particular, and without limiting the generality of the foregoing, the general board, directly or through any entity created by it, is authorized and empowered:

1. a) To operate, manage, and administer the mandatory benefit funds, plans, and programs established by the General Conference: ~~(1a) the Ministerial Pension Plan, amended and restated effective January 1, 2007, as the Clergy Retirement Security Program (including its legacy plan supplements, the Ministerial Pension Plan and the plan known as the Pre-82 Plan); (2b) the Retirement Security Program for General Agencies of The United Methodist Church, amended and restated effective January 1, 2010, as the Retirement Plan for General Agencies (including its legacy plan supplements); (3) the Global Episcopal Pension Program (including its legacy plan supplement); and (4e) the Comprehensive Protection Plan; and (5) the Compass Retirement Plan.~~ (3) the Global Episcopal Pension Program (including its legacy plan supplement); and (5) the Compass Retirement Plan. The provisions of these mandatory benefit programs shall be incorporated by reference into

the *Discipline* and shall have the full force of law as if printed in the *Discipline*. The distinctively connectional aspects of these mandatory benefit programs may be amended only by the legislative body responsible for U.S.–adaptable matters, or by the General Conference, in the absence of such legislative body. The general board may amend provisions of the plans from time to time, to the extent such amendment does not reduce benefits, rights or features of participants (as those terms are defined by applicable secular law), does not add cost to plan sponsors, does not impose new charges on participant accounts, and is not prohibited by applicable law or Judicial Council ruling. If for any reason any of such amendment authority of the general board described above or in the plan document is held by the Judicial Council to be unconstitutional, then that portion of the amendment authority that is ruled unconstitutional shall instead be held by the legislative body responsible for U.S.–adaptable matters, or by the General Conference, in the absence of such legislative body.

b) No proposal shall be made to the General Conference that changes a benefit presently in effect without first securing through the General Board of Pension and Health Benefits an actuarial and legal opinion concerning the cost, legality, and other related aspects of the proposed change.

Date: July 21, 2023

Signature of Petitioner: \_\_\_\_\_

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