



Enrollment

Clergy Retirement Security Program (CRSP), United Methodist Personal Investment Plan (UMPIP), Comprehensive Protection Plan (CPP), UMLifeOptions

Part 1 – Participant Information. To be completed by the clergy person or plan sponsor or salary-paying unit.

Participant name _____ Primary phone # (____) _____
 Home address _____ Alternate phone # (____) _____
 _____ Spouse name _____
 E-mail address _____ Spouse Social Security # _____
 Participant Social Security # _____ Spouse birth date _____
 Participant birth date _____ Marriage date _____
 Participant gender: Male Female Effective date of status _____
 Member conference _____

The clergy person is appointed:

- To a local church To attend school To an extension ministry
 To a conference responsible unit such as the conference or district office

Check one of the statuses below:

- Provisional Elder* Elder in Full Connection* Associate Member*
 Provisional Deacon* Deacon in Full Connection* Member of Other Denomination*
 Student Local Pastor* Full-time Local Pastor Part-time Local Pastor*
 Full Member* under *The Book of Discipline*, 1992

* If serving less than full-time, check one: ¾ ½ ¼ Less than ¼ (applies to Part-time Local Pastors and Deacons only)

Part 2 – Church/Employer Information. To be completed by the plan sponsor or salary-paying unit.

Church/employer name(s) _____ Church/Employer #(s) _____
 Address _____ Conference _____
 _____ Phone # (____) _____
 Hours of availability _____ E-mail address _____

Part 3 – Reason for Enrollment. To be completed by the plan sponsor.

- First-time enrollee (never previously enrolled in any plan) Re-enrollment after previous participation
 Addition of a plan Transferred from another plan sponsor

(continued)

Part 4 – Plan Enrollment. To be completed by the plan sponsor.

- UMPIP Effective date _____
- CRSP¹ Effective date _____
- CPP Effective date _____
- UMLifeOptions—Clergy Supplemental Life Insurance Plan^{2,4} Effective date _____
- UMLifeOptions—Lay Long-Term Disability/Life Insurance Plan^{3,4} Effective date _____

¹ Only a conference may sponsor CRSP

² Only available for clergy enrolled in CPP and appointed to at least ½ time appointment

³ Only available for lay employees, and for local pastors and Members of Other Denominations appointed to ½ or ¾ time appointment

⁴ Participants are enrolled automatically if the plan sponsor has adopted the plan and the participants meet the eligibility criteria

Part 5 – Participant Contributions to UMPIP. To be completed by the plan sponsor or salary-paying unit.

Effective date _____

The participant completed a *Contribution Election* form (or a *Contribution Election/Automatic Enrollment Notice*) and elected to contribute at the following rates. If you elected Automatic Enrollment on your UMPIP Adoption Agreement and the participant did not complete one of these forms, insert the before-tax default percentage below. Enter either the percentage or dollar amount, but **not** both.

Before-tax contributions: _____ % **or** \$ _____ per month

Roth contributions: _____ % **or** \$ _____ per month

After-tax contributions: _____ % **or** \$ _____ per month

Part 6 – Compensation Information. To be completed by the plan sponsor or salary-paying unit.

Effective date of compensation _____

1. Total Cash Salary: \$ _____

(Cash paid to clergyperson by the church/charge and/or conference. Total cash salary consists of base pay, cash bonuses, equitable compensation, cash allowances, cash to clergyperson for benefit programs, before-tax, Roth and after-tax contributions to UMPIP and other 403(b) programs, Section 125 medical reimbursement and designated housing exclusion.) **Total cash salary does not include cash allowances provided in lieu of parsonage.**

IRC Section 107 Housing Exclusion: \$ _____

(Amount included in Total Cash Salary above that has been designated by the charge conference for housing expenses and not subject to federal income taxation.)

2. Housing (check only one):

Parsonage provided

Housing allowance in lieu of parsonage: \$ _____

(Cash provided to clergyperson in lieu of parsonage.) **This amount should not be included in Total Cash Salary.**

Part 7 – Plan Sponsor Information. To be completed by the plan sponsor.

Plan sponsor name _____ Employer # _____

Plan sponsor address _____ Phone # () _____

Authorized representative _____ Title _____

Authorized signature _____ Date _____

Please complete this form and send it by mail to Wespath Benefits and Investments,
1901 Chestnut Ave., Glenview, IL 60025. Be sure to keep a copy for your records.