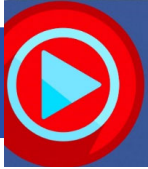


The Right Start

The Rio Texas Conference
Benefit Transition





The Right Start

Appointment Change Benefit Checklist

REQUIRED FORMS: *(Send forms to Isabel Munoz at imunoz@riotexas.org)*

- 2022 Compensation Form to District Office
- Clergy Benefits Contact Change Form
- UMPIP Election/Contribution Agreement (UMPIP elections do not carry over to new appointment)

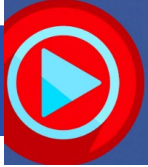
OPTIONAL

- Wespath Beneficiary Form
- HealthFlex Enrollment/Change Form (to add or drop dependents)

MOVING

- If renting or in parsonage obtain a Renter's Insurance policy
- Understand tax implications for Conference paid moves

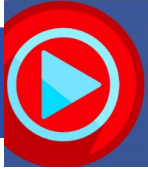




The Right Start

Benefit Seminar for First Time Appointees May 24 10:00 AM – 12:00 Noon

- All clergy taking their first appointment in the Rio Texas Conference or moving from a part-time appointment to a full-time appointment should plan to attend Benefit Seminar
- **You can Join the Zoom meeting from PC, Mac, iOS or Android**
Meeting Link : <https://riotexas.zoom.us/j/87200430898?from=addon>

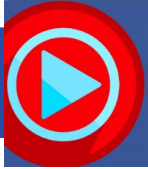


The Right Start

2022 Important Dates

- | | |
|----------------|---|
| June 15 | Deadline to return compensation and benefit forms |
| June 19 | Last Sunday for leaving pastor |
| June 23 | Moving day |
| June 26 | First Sunday |
| July 1 | Compensation at new appointment begins
New benefit elections begin |

Remit Compensation Form to District



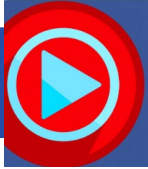
The Right Start

Moving

Clergy moving to a full time appointment to a charge/Conference and clergy entering retired status or going on disability leave.

- Local, long-distance, self-moves
- 2 move estimates to *Commission on Equitable Compensation & Moving Expenses*
- Moving company paid directly by Conference





The Right Start

Moving & Renter's Insurance

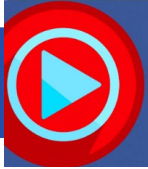
- Renter's Insurance for personal belongings available through Church Mutual **1-800-554-2642**
- Various insurance carriers offer renters insurance

Conference Moving Policy Assistance:

Monica Moore

210-408-4519

monicam@riotexas.org



Moving Tax Implications



January 1, 2018 - *The Tax Cuts and Jobs Act*

- Eliminates tax deductions and the exclusion from gross income to prevent the taxability of moving expense payments
- Payments made on your behalf for moving are subject to SECA taxes
- Impacted clergy will receive a 1099-MISC from Conference in **January 2023**
- Plan to make additional tax payments accordingly to cover the liability. Act is expected through December 31, 2025
- Minimal impact to plan compensation and pension contributions



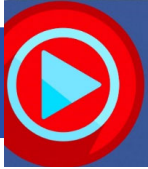
The Right Start

Compensation Form

Adopted by charge conference

- Base Salary
- Housing Type
- Additional IRS Exclusion If needed
- Plan Compensation
- Health Benefits
- Accountable Reimbursement Plan
- Pension
- Signatures

Line #	Part I - General	Info & Calculations	Line #	Charge Expense
1	Pastor Name (Select green cell, then use drop-down button to find pastor's name)	Select Pastor's Name	1	
2	Appointment Title	\$0	2	
3	Conference Relationship	\$0	3	
4	% Service (Full Time=100%; 3/4 time=75%; half time=50%; quarter time=25%)	0%	4	
5	Charge Name (Select green cell, then use drop-down button to find Name of Charge)	Select Charge's Name	5	
6	District	\$0	6	
9	RGC Legacy Church <small>(If there are no other church expenses, are paid through Legacy Church)</small>	\$0	9	
Line #	Part II Salary		Line #	Charge Expense
10	Base Salary Paid by Church		10	\$ -
11	Conference or District Salary Support (must be requested & approved)	\$ -	11	
12	Total Salary to Pastor from Church(es) + Conference/District Salary Support	\$ -	12	
13	Type of Housing Supplied by Church to Pastor	Parsonage	13	
14	Housing Allowance supplied instead of Parsonage		14	
15	Pre-tax deduction from Pastor's Salary for IRS 107' Exclusion as Pastoral Housing Cost	\$ -	15	
16	Plan Compensation For Pension Purposes	\$ -	16	
A Full Time Clergy must elect a UMPMP Contribution of at least 1% of Plan Compensation to receive full pension benefits				
Line #	Part III Health Benefits		Line #	Charge Expense
17	Clergy is Eligible and responsible for participation in HealthFlex Participation unless waived.	#N/A	17	
18	Waiver for Exceptions to HealthFlex Mandatory Coverage - See Instructions	No Waiver	18	
19	Pastor's HealthFlex Benefit Coverage	(1) Clergy Only	19	
20	Amount to be Billed to Church for Selected Coverage	#N/A	20	
21	Church's Minimum HealthFlex Premium Responsibility		21	#N/A
22	Amount for "Church Election" = Cost for Selected Coverage - Church's Minimum Responsibility	#N/A	22	
23	Portion of "Church Election" that is selected as a church responsibility for cost of insurance		23	\$ -
24	Church's Total HealthFlex Cost For This Pastor		24	#N/A
Line #	Part IV Accountable Reimbursable Plan (ARP)		Line #	Charge Expense
25	Accountable Reimbursement Plan (ARP)		25	\$ -
Line #	Part V Recap of Church Costs		Line #	Charge Expense
26	Salary		26	\$ -
27	Housing Allowance		27	\$ -
28	Accountable Reimbursement Plan (ARP)		28	\$ -
29		Paid by RGC Legacy Funds	29	
31	Health Benefit Expense	\$ -	31	#N/A
32	Comprehensive Protection Plan (CPP)	\$ -	32	\$ -
33	Clergy Retirement Security Program (CRSP) defined benefit	\$ -	33	#N/A
34	Clergy Retirement Security Program (CRSP) defined contribution	\$ -	34	#N/A
35	UMPMP Church Contribution (for Part Time Appointments)	\$ -	35	\$ -
36	Total RGC Legacy Contribution >	\$ -	36	
37	Church's Total Compensation Expense (Excludes cost of Utilities)		37	#N/A
38	Church's Total Compensation Expense (Excludes cost of Utilities) LESS any RGC Legacy Contribution		38	#N/A
Part VI Signatures				
Pastor's Signature			Date:	
Local Church Representative Name & Office / Signature			Date:	
District Superintendent's Signature			Date:	

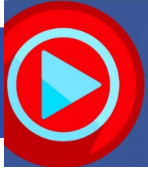


The Right Start

UMPIP – United Methodist Personal Investment Plan



- Complete UMPIP Enrollment to continue participation at new appointment
- Personal Before, After Tax or Roth Contributions
- Minimum 1% to receive CRSP DC Match for Full-Time
- UMPIP-PT (Part-time) employer contribution of 9%
- Investments are pre-screened for social responsibility
- Change Investments at any time using *Benefits Access at www.wespath.org*



The Right Start

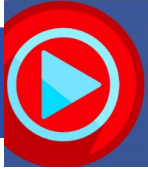
HealthFlex

100% Full-Time Appointments

- Medical Plan
- Preventive Care
- Vision Exam
- Dental
- Flexible Benefits/Health Savings Accounts
- Employee Assistance Plan EAP
- Wellness
- *Church Contribution is Mandatory for Clergy Appointed to 100% full-time service*



Group Health Plan — UMC



The Right Start

Wellness Opportunities

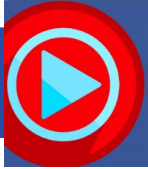
To promote awareness, encourage, enable and educate clergy to assume personal responsibility for their physical, emotional and spiritual health

Wespath Center for Health

Rio Texas Conference Clergy Wellness Plan

www.riotexas.org





The Right Start

Questions?

Benefit Plan Contact Information

Human Resources and Benefit Plan Administration

Isabel Munoz

imunoz@riotexas.org

210-408-4526

Benefit Plan Processing and Church Benefit Plan Billing

Lissette Guillen

210-408-4548

lguillen@riotexas.org

Moving Process & Conference Move Policy

Monica Moore

monicam@riotexas.org

210-408-4519

Rio Texas Clergy Wellness Plan

Eve Albert

evealbert@riotexas.org

210-408-4551