



## Enrollment

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### 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 \_\_\_\_\_
- CRSP<sup>1</sup> ..... Effective date \_\_\_\_\_
- CPP ..... Effective date \_\_\_\_\_
- UMLifeOptions—Clergy Supplemental Life Insurance Plan<sup>2,4</sup> ..... Effective date \_\_\_\_\_
- UMLifeOptions—Lay Long-Term Disability/Life Insurance Plan<sup>3,4</sup> ..... Effective date \_\_\_\_\_

<sup>1</sup> Only a conference may sponsor CRSP

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

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

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

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**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

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**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.**

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**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.