Retirement Planning Resources

There are a variety of resources to assist TAC clergy with planning for retirement:

1. **Wespath Retirement Team**
   Wespath Benefits and Investments has a Retirement Team which can run retirement projections for prospective retirees and answer questions regarding the retirement process. The Retirement Team can be reached at **1-800-883-4078**, Monday – Friday, 8 a.m. to 6 p.m. Central time.

2. **EY Financial Planning Services**
   Wespath provides financial planning services through EY (formerly Ernst & Young) *at no charge* to active participants and surviving spouses with an account balance in a Wespath plan and to retired participants with an account balance of at least $10,000. EY's financial planners can provide confidential, professional assistance on a wide range of financial issues such as:
   - Making investment decisions
   - Retirement planning and projections
   - Understanding tax issues
   - Managing credit card and other debt
   - Evaluating insurance needs and options
   - Buying a home or car
   - Saving for your children's college education
   - Estate planning

   EY does not sell any investment or insurance products. Call EY at **1-800-360-2539**, business days from 8:00 a.m. to 7:00 p.m., Central time. For further information, visit Financial Planning Services | Wespath Benefits & Investments.

3. **Benefits Access Online Account Services**
   Benefits Access is your online access to your Wespath retirement accounts. Go to Benefits Access - Login to register.

   Benefits Access gives you access to:
   - Your Wespath retirement plan account balances, transactions, investment returns and allocations
   - Retirement Projections – you can get estimates of your retirement funds available at projected retirement dates
   - Update your Beneficiary Designations online
   - Articles on a variety of retirement and financial planning issues under "Learn"
   - Electronic delivery of statements and the Wespath publication *Hark*.

4. **TAC Pre-Retirement Seminar**
   The Texas Annual Conference offers a Pre-Retirement Seminar to clergy ages 50+ and their spouses every other year. Invitations will be emailed to eligible clergy and spouses. This seminar will feature presentations from Wespath, EY, and others retirement experts.

   Topics include:
   - Spiritual and social aspects of retirement planning
   - Wespath retirement plan benefits (CRSP, MPP and Pre-1982 Plans)
   - Retirement planning and managing investments
   - Clergy tax issues
   - Social Security
   - TAC Retiree health benefits