

Clergy Retirement Eligibility

According to ¶ 358 of the *2012 Book of Discipline*, eligibility for clergy retirement can be based *either* on age or years of service. Clergy need only meet *one* of the following criteria for their retirement classification – they do not need to meet both. (Please refer to the *Discipline* for complete details.)

Full Retirement: Age 65 or 40 years of service

Early Retirement: Age 62 or 30 years of service
(Under Early Retirement, clergy are eligible for retirement benefits at the time of retirement, but benefits may be subject to a reduction since they will be paid over a longer period of time).

Twenty Year Rule 20 years of service
Clergy who retire under the Twenty Year Rule must wait until age 62 to begin receiving retirement benefits. Also, clergy who retire under the Twenty Year Rule will not be eligible for Retiree Death Benefits under the Comprehensive Protection Plan (CPP).

Mandatory Retirement Age 72 on or before July 1

Retirement Process

1. Submit your retirement request in writing to Bishop Jones at least 120 days in advance to allow sufficient time for Cabinet/BOM approval and for processing of your retirement benefits with the General Board of Pensions. (Retirement requests can be approved with less than 120 days' notice at the discretion of the Bishop and Cabinet; however, there may be a delay in receiving retirement benefits).

Your retirement letter needs to include:

- a. Your requested retirement date (*this should be the first day of the month in which you retire*). For example, if your last day worked is December 31, your retirement effective date would be January 1.
- b. If you are retiring at Annual Conference, your retirement date will be *July 1*.

Mail or email your letter to: Bishop Scott J. Jones
5215 Main St.
Houston TX 77002
nhinshaw@txcumc.org

2. Mail or email a copy of your retirement request letter to:
 1. Your District Superintendent
 2. Rev. Gail Ford Smith, Director
Center for Clergy Excellence
Texas Annual Conference

5215 Main St., Houston, TX 77002
gsmith@txcumc.org

3. Rev. Marilyn White
BOM Conference Relations
2418 McGowen St.
Houston, TX 77004-1418
w.marilyn@att.net
3. Once retirement eligibility has been verified and the requirement request approved by the Cabinet, the TAC Benefits Office will submit the retirement request to Wespath (formerly the General Board of Pensions), pending final approval by the Board of Ordained Ministry.
4. Wespath will send the prospective retiree a retirement packet with pension benefits information and distribution options approximately 2 weeks following receipt of retirement notification.
5. Pension Application for Benefits forms need to be returned to Wespath within 180 days of the date in the upper right hand corner of the forms.
6. You will receive information from the TAC Benefits Office regarding TAC Retiree Group Health Options. If participating in a TAC Medicare Primary Group Health plan, you will need to enroll in both Medicare Part A and B. *Your Part A and B effective dates must be no later than the date of your retirement.*
7. You will receive a Move Packet from the Center for Clergy Excellence if you qualify for this benefit after the approval process is complete.
8. In the spring, all retirees will receive information regarding Retiree Videos, the Retiree Luncheon and the Retiree Worship Celebration at Annual Conference.