Clergy Retirement Eligibility

According to ¶ 357 of the 2016 Book of Discipline, eligibility for clergy retirement can be based either on age or years of service. Clergy only need to 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).

**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 Wespath. (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:

1) 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 June 30, your retirement date would be July 1.

2) If you are retiring at Annual Conference, your retirement date will be July 1.

Mail or email your retirement letter to: Bishop Scott J. Jones
5215 Main St.
Houston, TX 77002
rrodriguez@txcumc.org
2. You will also need to mail or email a copy of your retirement letter to the following:

1) Your District Superintendent

2) Rev. Carol Bruse  
   TAC Conference Benefits Officer  
   5215 Main Street., Houston, TX 77002  
   ebruse@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 your requirement request approved by the Cabinet, the TAC Benefits Office will submit your retirement request to Wespath (formerly the General Board of Pensions), pending final approval by the Board of Ordained Ministry.

4. Wespath will send prospective retirees a retirement packet with information on how to apply for your retirement benefits online.

5. You will receive information from the TAC Benefits Office regarding TAC Retiree Health Benefits. If you will be 65 or older at retirement, you will need to enroll in both Medicare Part A and B to be effective no later than the date of your retirement.

6. You will receive a Move Packet from the Center for Clergy Excellence if you qualify for this benefit after the approval process is complete.

7. In the spring, all retirees will receive information regarding Retiree Videos, the Retiree Luncheon, and the Retiree Worship Celebration at Annual Conference.