

Retirement Planning Resources

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

1. **GBOP Retirement Team**

The General Board of Pensions (GBOP) 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. **Ernst & Young (EY) Financial Planning Services**

The General Board provides Ernst & Young (now EY) Financial Planning Services *at no charge* to active participants and surviving spouses with an account balance in a GBOP 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
- Managing credit card and other debt
- Understanding tax issues
- 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 directly at **1-800-360-2539**, Monday through Friday, 8:00 a.m. to 7:00 p.m., Central time. For further information, go to <http://www.gbophb.org/retirement/services/ey/>.

3. **Benefits Access Online Account Services**

Benefits Access is your online access to your GBOP retirement accounts. Go to <https://www.benefitsaccess.org/login.aspx> to register. You will need your Social Security number and the PIN number which the GBOP mailed you in your initial enrollment packet. If you do not know your PIN, you can request a new one.

Benefits Access gives you access to:

- Your GBOP retirement plan account balances, transactions, investment returns and allocations;
- Retirement Projections – you can get estimates of your retirement funds available at projected retirement dates;
- Articles on a variety of retirement and financial planning issues under “Learn More;”
- Electronic delivery of statements and the GBOP 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. The next Pre-Retirement Seminar will be held in November 2015 at Lakeview Methodist Conference Center. Invitations will be sent to eligible clergy.

This seminar will feature presentations from the GBOP, Social Security, Ernst & Young, and others retirement experts. Topics include:

- Retirement planning and individual retirement projections
- Investments in retirement
- Social Security
- Spiritual and social aspects of retirement planning
- Clergy tax issues
- TAC Retiree Group Health options
- Estate planning