

## 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 will be subject to an actuarial reduction since they will be paid for 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 approval and for processing of your retirement benefits with Wespath. Retirement requests can be approved with less than 120 days' notice; however, there may be a delay in receiving retirement benefits or retiree health benefits.

Your retirement letter needs to include:

- 1) *Your requested retirement effective date* – this should be the *first day of the month following your last day as an active clergy*. For example, if your final day under appointment as an active clergy is December 31, your requested retirement effective date would be January 1 of the next year.
- 2) If you are retiring at Annual Conference, your retirement date will be *July 1*.

Email or mail your retirement letter to: Bishop Scott J. Jones  
5215 Main St.  
Houston, TX 77002  
[rrodriguez@txcumc.org](mailto:rrodriguez@txcumc.org)

2. You will also need to email or mail 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  
[cbruse@txcumc.org](mailto:cbruse@txcumc.org)
  - 3) Rev. Marilyn White  
BOM Conference Relations  
2418 McGowen St., Houston, TX 77004-1418  
[w.marilyn@att.net](mailto:w.marilyn@att.net)
3. Once your retirement eligibility has been verified and your requirement request approved by the Cabinet, the TAC Benefits Office will submit your retirement date to Wespath.
  4. Wespath will send you a letter with directions on how to apply for your retirement benefits online. If you have not already set up your online account in Wespath's Benefits Access, you should do so as soon as possible as you will need to have an online account in order to apply for your retirement benefits. Go to [Benefits Access - Login](#) to set up your Benefits Access account.
  5. If you are a full-time or part-time local pastor who has not completed the required Course of Study, you will retire as lay person, not as a Retired Local Pastor. You will not be listed as a Retired Clergy at Annual Conference. If you serve at a church after retirement, your conference relationship will be Lay Supply. This change of conference relationship will not impact any retirement benefits that you will be eligible to receive.
  6. 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.
  7. You will receive a Move Packet from the Center for Leadership Formation 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.
  9. Note: Honorable Location is a termination of conference relationship, and former conference members on Honorable Location who request Honorable Location-Retired status are not listed or recognized as Retired Clergy at Annual Conference.