

The NC Conference Board of Pensions has been offering financial and retirement planning seminars for several years now. These have drawn several hundred participants and their comments attest to the value of this ministry:

**"The seminar was great. All presentations led to needed discussion."**

**"This should be a mandatory meeting for all new ministers and offered throughout ministry time for check-up."**

**"The ability to talk to a consultant one on one was excellent. What a great way to learn and ask questions. The seminar has been excellent. I look forward to reading & interpreting the resources provided."**

**"Very good overview of a lot of concepts. Kept at a level that most anyone should be able to understand."**

Experience has shown that when clergy families have a good handle on their financial condition and future plans, then ministry is enhanced as the burdens of financial worries are lessened. We feel that good planning frees our pastors and their families to be more effective in serving Christ and the Church.

These events are subsidized substantially by the Conference Board of Pensions so the costs reflect a minimum of financial participation on behalf of each attendee. Please join us for this event! For more information, please contact JoAnna Cafferty at 919-832-9560 x. 225.

**Good planning shapes good decisions.  
That's why good planning helps to make  
elusive dreams come true.**

**- Lester R. Bittel, *The Nine Master Keys of  
Management***

NC CONFERENCE  
UNITED METHODIST CHURCH  
PO Box 10955  
Raleigh, NC 27605

NC CONFERENCE BOARD OF  
PENSION

## Financial and Retirement Planning Workshop

October 22, 2009  
8:45 AM - 4:00 PM



*Meeting at:  
Garner UMC  
201 Methodist Dr.  
Garner, NC 27529*

## Topics include....

### **FINANCIAL & LEGAL PLANNING**

Rev. Jim Mentzer brings a professional and ministerial perspective to the areas of estate planning and preparations for retirement.

### **PENSION INFORMATION**

A representative of the General Board of Pension and Health Benefits will explain the the benefits of the clergy pension plans, your personal pension projections, and how to manage your pension resources.

### **POST-RETIREMENT HEALTH**

### **INSURANCE**

The resident Conference *Insurance Guru* will tell you what you can do now in order to enjoy the full benefits available to you in retirement.

### **FIRST TIME HOME BUYING & YOUR CREDIT**

A Credit Counselor will speak on important steps to manage your credit wisely in preparation for buying your first home.

### **Cost**

Costs include snack breaks, lunch, and presentation materials

\$10.00 per person / \$15.00 per couple

## The Middle Years of Ministry

*Recommended for clergy with more than 5 years in the ministry, yet more than 10 years from retirement*

### Schedule

8:45 - 9:00 AM	Registration/Welcome
9:00 - 9:10 AM	Devotion
9:10 AM-10:40 AM	General Board of Pension and Health Benefits (Peter Hang)
10:40-10:50 AM	Break
10:50-12:00 PM	Financial Planning (Jim Mentzer)
12:00-12:50 PM	Lunch
12:50-1:50 PM	Legal Planning (Jim Mentzer)
1:50-2:20 PM	Ministers' Transition Fund (Kermit Braswell)
2:20-2:30PM	Break
2:30-3:30	In Depth Credit (Rebekah O'Connell, Triangle Family Services)
3:30-3:50 PM	NC Conference Health & Life Insurance (Caroline Thornton)
3:50-4:00 PM	Evaluations
4:00 PM	Benediction

## Registration Form

Registration deadline: October 8, 2009

Clergy Preferred Name \_\_\_\_\_

Spouse Name (if attending) \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email Address \_\_\_\_\_

Expected retirement age: \_\_\_\_\_

Amount Enclosed: \_\_\_\_\_

For additional information  
call JoAnna Cafferty in the Treasurer's  
Office  
1-800-849-4433 / 919-832-9560  
Ext. 225  
or email: [jcafferty@nccumc.org](mailto:jcafferty@nccumc.org)  
Mail registration form and check to:  
Retirement Planning Workshop,  
PO Box 10955, Raleigh, NC 27605.  
Please make checks payable to NC Conference of the United Methodist Church.