

# How Will This Seminar Help ME?

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. This info-packed event shows clergy the tools they already have (but may not know it!). With these resources, clergy can prepare for their own financial, physical, and emotional well-being as well as that of their families and their ministry.

***I'm just getting started in the ministry and am too busy to come. I'll just attend another event someday.*** Why is planning for your well-being less important than anything else? Come learn to maximize the benefits God has given you as a result of repending to the call of ministry.

***Between paying my current bills and my fixed salary, I can't afford to plan for the future.*** Financial planning isn't about having money. It's about making your assets work hard for you. This seminar will show you what your benefits are already doing for you.

***I'll be retiring soon. It's too late for me to do anything about all this.*** Financial matters can be complex and now is the time to make important decisions for yourself. Start learning about this future transition in your ministry and life at this event!

NC Conference  
United Methodist Church



# Clergy Benefits Seminar

MARCH 12-13, 2026



THE BENEFITS & RESOURCES THAT  
SUPPORT CLERGY IN ACHIEVING  
FINANCIAL, PHYSICAL, & EMOTIONAL  
WELLBEING

***Meeting and Hotel Accommodations at:***

Hotel Ballast in Downtown Wilmington  
301 North Water Street

Event Registration begins at 9:30 a.m., Thursday,  
March 12

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Event Conclulsion by 3:00 p.m., Friday, March 13

## Topics Include.....

### What A Pension Plan Can Do For You!

Bob Christophel and Frank O'Brien, Wespah Benefits Educators, will provide in-depth information and materials to explain the UMC retirement plan benefits and help attendees make informed decisions.

### Benefits You Hope You Never Need

For those difficult times in life, the disability and death benefits become important assets for clergy and their families.

### NC Conference Ways to Health and Wellness

The Insurance and Wellness programs will be outlined in addition to post-retirement benefits.

### Financial Wellness

An EY representative will propose simplified and practical ways to take full command of your financial wellness, including setting and living into your financial goals, managing your household balance sheet and planning for a secure retirement.

### Managing Your Credit

An EY planner will lead participants through understanding credit reports, credit scores and what can be done to repair or improve them.

### Estate Planning

Attendees will learn about proper planning for their families and financial affairs with important legal documents that everyone needs to have.

**PLUS Transition Fund, Social Security Benefits, and MORE!!**

## Agenda

Attendees are invited to arrive by 9:30 a.m. Thursday morning. Presentations all day on Thursday and on Friday morning will provide an overview of the benefits for all active clergy at any age and stage of ministry. Clergy in their early or mid-years of ministry will be especially interested in the topics of benefits, financial wellness, and the Transition Fund. After lunch on Friday, staff will guide those clergy who have decided to retire at Annual Conference 2026 through the online applications they must complete to enact their pension benefits upon retirement. All clergy spouses are encouraged to attend, too!

## Hotel

The cost of one night's hotel stay at the Hotel Ballast is provided by the Conference Board of Pension. A limited number of additional nights' lodging may be available at the cost of the participant. Please indicate on the registration form which nights you'll be staying at both the Conference expense and your own expense. Information about reserving additional nights and the rates will be provided upon registration for the seminar.

Advance cancellation of at least 72 hours is required to avoid incurring the cost of your hotel reservation.

Free, private, 20-minute consultations with the seminar speakers are available during this two-day event. Registered attendees will receive further details about signing up for a consultation.

### **Registration deadline: January 26, 2026**

Clergy Preferred Name

Spouse Name (if attending)

Mailing Address

City State Zip

Phone

Email Address

Mail form and check to the NC Conference to Clergy Benefits Seminar, 700 Waterfield Ridge Place, Garner, NC 27529. Questions? Call JoAnna Ezuka at 984-207-6248 or email: [jezuka@nccumc.org](mailto:jezuka@nccumc.org)

**Contact JoAnna by January 31 with any dietary restrictions.**

### **Please check the event package with fits your needs:**

- Entire event: single attendance \$60
- Entire event: couple attendance \$110
- Commuter fee: single attendance \$25
- Commuter fee: couple attendance \$45

Enclosed is a check for \$\_\_\_\_\_ to cover the package marked above.

### **Please mark below which one (1) night you intend to stay at the**

#### **Conference's expense:**

None  Wednesday  Thursday

### **Please mark below which night(s) you intend to stay at your own expense:**

None  Wednesday  Thursday  Friday  Saturday

*Online registration and payment is also available at [www.nccumc.org/treasurer](http://www.nccumc.org/treasurer)*