

# Enrollment Form

## Clergy Retirement Security Program (CRSP), United Methodist Personal Investment Plan (UMPIP), Comprehensive Protection Plan (CPP)



Oklahoma United Methodist Conference  
1501 NW 24th Street  
Oklahoma City, OK 73106  
(405) 530-2000  
www.okumc.org

To begin participation in the benefit plans, you must be enrolled in plans for which you are eligible to participate. At the time of enrollment, the Oklahoma United Methodist Conference & General Board of Pension and Health Benefits need certain information from you. Please complete Parts 1, 2, & 3 and either submit by e-mail or print the form out & return it to the Oklahoma United Methodist Conference at the address listed on the top of the form.

### Under Part 1:

Spouse information is needed since upon the pastor's death the spouse is the primary beneficiary unless specified otherwise under the "*Designation of Beneficiary-Retirement Plan*"

### Under Part 2:

The Effective Date is based on the date that a Local Pastor License was received/effective or the date of appointment for a Member of Oklahoma Conference, other Conference, or Denomination.

Full-Time is someone who is appointed to serve a church 30 or more hours per week.

3/4 Time is someone who is appointed to serve a church 21 hours to 29 hours per week.

1/2 Time is someone who is appointed to serve a church 11 hours to 20 hours per week

1/4 Time is someone who is appointed to serve a church up to 10 hours per week

### Under Part 3:

The Effective Date for CRSP and CPP will fill in automatically based on the Effective Date, Clergy Status, and time of appointment listed in Part 2.

The UMPIP Effective Date is based on the pastor's choice as this plan is an optional plan. This must be equal to the 1st of the month.

Before-Tax and After-Tax Contributions are listed only in dollar amounts only for ease of billing by the Oklahoma United Methodist Conference. If a percentage of salary is wanted, please calculate the annual dollar amount and enter that amount in the appropriate box. If no participation is wanted at this time, please place \$0 in the boxes. These both have limitations on amounts that can be contributed please contact the Oklahoma United Methodist Conference Pension Director or Conference Benefit Officer in regard to the limits.

Participation in UMPIP may change as of the 1st of any month, please fill out the *Before-Tax/After-Tax Contribution Agreement to UMPIP* to make a change to the amount or to start making contributions after this agreement has already been submitted.

Please submit form by email by using the button on the bottom of the form or print the completed form out & send it to the address on the top of the form to the attention of Pension Benefits.

Other forms that also need to be filled out & the originals mailed to the Oklahoma United Methodist Conference include:

*Designation of Beneficiary Form - Retirement Plans* (all participants)

*Designation of Beneficiary Form - Welfare Plans* (participants with CPP coverage only)

*Investment Election Form* (all participants)

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### Part 1 - Clergy Information

Name (First Middle Last)  SSN (No Hyphens)

Birthdate (mm/dd/yy)  Home Address

Home Phone #  Work Phone #  Gender  Male  
 Female

Married  Not Married Spouse Name

Marriage Date  Spouse Birthdate  Spouse SSN

### Part 2 - Appointment Information

Effective Date (mm/dd/yy)  Member Conference

Clergy Status   Full Time  3/4 Time  
 1/2 Time  1/4 Time

Charge

### Part 3 - Enrollment Information

**CRSP** is a mandatory plans for clergy under appointment.

Effective Date

**CPP** is mandatory for full time clergy (based on salary + housing).

Effective Date

**UMPIP** is optional. This plan is where the clergy can have money withheld from his/her paycheck on a before-tax or after-tax basis. Designate annual dollar amount below.

Effective Date

Before-Tax Contributions

After-Tax Contributions