

JULY 2022

We hope our emails are helpful. We use the **TWCHub** for our mailings. Please contact your district office for any email address changes.

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**OUR TOPIC TODAY: DON'T FORGET ...**

~Your administrative assistant! They are serving in your ministry instead of a secular job that would include retirement perks! WPF enrolls laity—ministry staff, professors, schoolteachers, childcare workers, etc.

~You can upload new enrollments to your *Online Payment System* account.

~You have *Group Life Insurance* and *Group Long-Term Disability Insurance* with your pension enrollment!

~Contributions to your pension come from your employer and only your employer, not personally.

~You can donate to your pension through voluntary, salary reduced contributions—an elect deferral.

~The IRS limits how much you and your employer can contribute to your Plan annually—limits on WPF website.

~**You must be 62 years of age to access your funds—this is a “retirement” income account.**

~You can have your own online account—download the *PFG Online Access Flyer* for assistance.

~You can install a mobile app for your PFG online account on your cell phone—see *PFG Online Access Flyer*.

~You can easily change your investment options in your PFG online account.

~WPF forms are available on the WPF website for viewing or downloading.

~**Your ministry contribution account in our *Online Payment System* must be set up by December 1 this year!**

~WPF does not provide for loans or hardships of any kind.

~You cannot roll over pension funds from or to ROTH IRAs.

~**Beneficiary forms are required with enrollments, and you must list a primary and/or contingent beneficiary.**

~Federal (and some state) taxes are withheld when withdrawing funds unless you are an ordained or licensed minister.

~If you are a licensed or ordained minister, all your pension funds are 100% housing allowance.

~WPF uses Target Date Retirement Portfolios that match your projected retirement date. Over time the allocations shift from being equity-oriented to fixed income-oriented to protect your capital as your retirement approaches.

~ECFA provides financial guides to assist with tax issues for ministers and non-profits—available on the WPF website.

~WPF has enrollment forms and the *Summary Plan Description* available in Spanish on the WPF website.

~To check deadlines for statements/forms/year-end processing on the WPF website.

~**To keep the WPF office updated on your contact information—address, primary phone, email, beneficiary info.**

~You can email us at [wpf@wesleyan.org](mailto:wpf@wesleyan.org) with any questions or need forms sent to you. We are happy to assist!

~All our email topics are available on the WPF website. See the dark blue *Monthly Email* toggle box.

~**We enjoyed meeting many of you at *General Conference*. Hope to see you at *The Gathering* in January!**

*Serving HIM for your benefit,*

**DEBRA LEVITE**

**DIRECTOR OF OPERATIONS**

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