

**Instructions for East Ohio Conference Churches with
Pastors Serving at 50% (1/2 time) and 25% (1/4 time)
For Completing the Adoption Agreement for Church Participation in the United
Methodist Personal Investment Plan (UMPIP)**

Part 1 – General Information

Please provide all the information requested in Part 1 of the adoption agreement.

- 1.1 State the name of the Church
- 1.2 Check the first box for “CHURCH”
- 1.3 Enter the church’s Federal employer Identification #
The Employer # is provided by the General Board of Pension & Health Benefit – Leave blank if not known.
- 1.4 Enter the mailing address of the Church
- 1.5 Enter billing address, IF different from mailing address
- 1.6 Enter church phone number
- 1.7 State name and title of contact person(s) for the church.
- 1.8 State contact person(s) phone number
- 1.9 State contact person(s) e-mail address
- 1.10 Enter “East Ohio Conference”

Part 2 – Participant Contributions

No action necessary (2.1 will apply). *Move to Part 3.*

Part 3 – Plan Sponsor Contributions

- 3.1 Check the first box if your church will be contributing ‘employer’ contributions for your pastor(s).

No action necessary in 3.2a through 3.2c. Skip to 3.2d

3.2d – through 3.2f

Check the appropriate box or boxes (*clergy appointed half time*) (*clergy appointed one-quarter time*) that currently apply or may apply to pastor(s) of your church.

Determine the type of ‘employer’ contributions that your church wishes to provide. (*Choose one: Matching, Non-Matching or Conditional*)

(*Note: required personal contributions by the pastor are based taxable cash compensation plus housing or parsonage value.*)

Matching

Church contribution requires the pastor to make personal contributions
Several options are available

Non-Matching

Limits the church contribution to 12%
Does not require the pastor to make personal contributions, but still allows the pastor to choose to make personal contributions.

Conditional

Limits the church contribution to 20%
The church may choose no personal contribution by the pastor, or limit the required pastor’s personal contribution - up to 4% (*Note-the pastor may contribute more than the church’s required pastor’s personal limit*)

Read Part 3.3 and Part 4

Complete Part 5 & Part 6 (*make copies of the completed document for church records*) and submit original to the General Board of Pension and Health Benefits per the instruction box on the last page on the Adoption Agreement.