

THE UNITED METHODIST FOUNDATION of New England, in cooperation with the Preachers' Aid Society, the Board of Ministry and the Conference Board of Pensions has been offering a variety of financial planning programs for several years now. These have drawn several hundred participants and their comments attest to the value of this ministry.

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.

We try to move these events around New England to allow every one of our pastors an opportunity to participate at various times. It is especially valuable to have spouses join in the events when that is possible.

All of these events are subsidized substantially by the sponsoring organizations so the costs for each reflect a minimum of financial participation on behalf of each attendee. For ongoing dates and events please check the websites for the United Methodist Foundation of New England, the Preachers' Aid Society of New England and the Annual Conference – as listed on this brochure.

Please join us in any of these programs which you feel may be helpful to you and your family. For more information on anything listed here, please contact the Foundation or Preachers' Aid Society offices.

## PLANNING FOR A LIFETIME OF MINISTRY

A Clergy Financial Planning Seminar Series

- ◆ Essential Concepts to Build a Secure Future
- ◆ Information on the new United Methodist Pension Program Starting January 1, 2007
- ◆ Knowing Your Real Estate Options
- ◆ Managing Your Credit
- ◆ Making the Most of Your Health Care Benefits

### SPONSORED BY:

THE UNITED METHODIST  
FOUNDATION OF NEW ENGLAND  
10 Bricketts Mill Road - P.O. Box 370  
Hampstead, New Hampshire 03841  
Phone 800-595-4347 Fax 866-231-5921  
info@umfne.org www.umfne.org

THE PREACHERS' AID SOCIETY  
OF NEW ENGLAND  
18 Main Street Extension  
P.O. Box 3386  
Plymouth, Massachusetts 02361  
Phone 508-830-9500 Fax 508-830-9582  
pas18@msn.com www.preachersaid.org



# PLANNING FOR A LIFETIME OF MINISTRY

A Clergy Financial Planning Seminar Series



2007 – 2008  
*Calendar of Events*

## THE EARLY YEARS OF MINISTRY

*Recommended for clergy in their first five years of ministry*

Topics include introductions to personal and family financial planning issues during your career including:

- ◆ An Introduction to Lifetime Financial Planning
- ◆ Taxes for Clergy Families
- ◆ Insurance Needs and Conference Insurance Programs
- ◆ Planning for Eventual Housing Needs
- ◆ Understanding Pension Programs and Resources
- ◆ Managing Your Credit and Credit Score
- ◆ Managing your higher education debt and financing your children's education

### NEXT SEMINAR:

February 20, 2008

**Rolling Ridge Conference Center**

North Andover, Massachusetts

978-682-8815

*THE PREACHERS' AID SOCIETY OF NEW ENGLAND will underwrite the cost of this event for clergy persons who are in their first full-time appointment to a local church.*

**SAVE THIS DATE!!**

**CLERGY TAX SEMINAR**

January 30, 2008

**Greenland United Methodist Church**  
Greenland, New Hampshire

## THE MIDDLE YEARS OF MINISTRY

*Recommended for clergy with 5 or more years of ministry*

Topics include issues of ongoing financial management with emphasis on pension options for maximum retirement resources.

- ◆ Investment and Financial Planning Strategies – essential concepts to build a secure future
- ◆ Tax Planning and Strategies
- ◆ Health and benefit concerns in mid-life: Key information on the new U.M. pension plan starting January 1, 2007
- ◆ Preparing for life's surprises: 4 legal documents everyone needs!
- ◆ Retirement housing options: A primer in real estate purchases
- ◆ Legal issues in ministry
- ◆ Credit management
- ◆ Long Term Care Insurance Program offered through the United Methodist Church

### NEXT SEMINAR:

November 7, 2007

**United Methodist Elder Care Center**

East Providence, Rhode Island

Also

Wednesday, November 5, 2008

**First United Methodist**

Church, Bangor, Maine, 207-942-8320

*Cost: \$15.00 per person or \$20.00 per couple  
Includes lunch and materials. Spouses are encouraged to attend*

*This event is largely subsidized by the UNITED METHODIST FOUNDATION OF NEW ENGLAND and the PREACHERS' AID SOCIETY but to keep costs low, there will be a modest registration fee.*

## PRE-RETIREMENT SEMINAR

*Recommended for clergy anticipating retirement in 8 to 10 years or less*

Topics include concerns leading up to retirement including:

- ◆ Insurance plan changes at retirement
- ◆ Preparing for major changes in housing circumstances
- ◆ Accessing Social Security and Medicare benefits
- ◆ Understanding the new denomination pension plan and its interaction with previous plans
- ◆ Spousal tax changes upon death of the clergy person
- ◆ Accessing pension accounts at 59.5 years of age
- ◆ The retiree health care supplement program
- ◆ Timing in drawing down pension, Social Security and IRA benefits
- ◆ Issues of retirement "lifestyle" changes

### NEXT SEMINAR:

April 17, 2008

**Marie Joseph Retreat Center,**

Biddeford, Maine

*This event is largely subsidized by the UNITED METHODIST FOUNDATION OF NEW ENGLAND and the PREACHERS' AID SOCIETY but there will be a modest registration fee.*