

**When and where?** Saturday, September 25, 2004; Northside UMC Fellowship Hall, 2571 North Highland, Jackson, Tennessee.



**Who should attend?** Active pastors over age 55, who would like to learn more about the benefits and options available to them as they approach the retired relationship.

**What will it cost?** Registration fee for the event is \$25.00 for couples and \$15.00 for individuals. Participants will be responsible for all travel expenses.

A box lunch will be provided from Jason's Deli. Please indicate your meal preference on the registration slip.

**How do I register?** Send your check by September 10<sup>th</sup>, in the amount of \$25.00 (couple) or \$15.00 (individual), payable to the Memphis Conference, and clearly marked for the retirement seminar registration. Include the registration slip on this brochure.

**We will not be able to accept registrations after September 10<sup>th</sup>, limited to the first seventy-five paid registrations.**

*Memphis Conference of the  
United Methodist Church*

*55+ Pre-Retirement Seminar*

*Saturday, September 25, 2004*

*Northside United Methodist Church  
Fellowship Hall  
2571 North Highland Avenue  
Jackson, Tennessee*

*Fellowship Hall is located in the back of  
the main building*



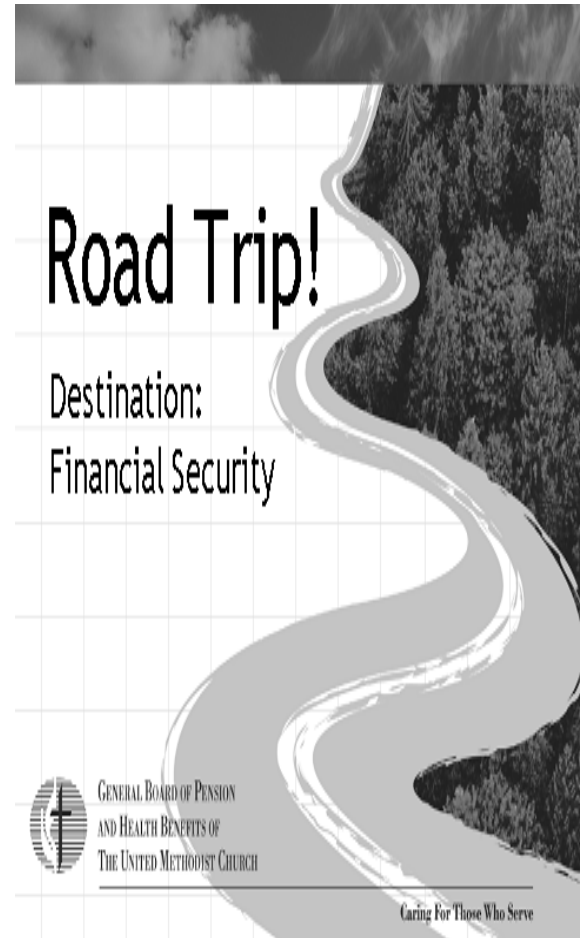
**Memphis Conference of the  
United Methodist Church**

**24 Corporate Blvd.  
Jackson, TN 38305  
Phone (731) 664-5540  
Fax (731) 660-2085**

**DRAFT**

**MEMPHIS CONFERENCE  
OF THE UNITED  
METHODIST CHURCH**

**55+ PRE-RETIREMENT  
SEMINAR**



# RETIREMENT PLANNING SEMINAR

Registration: Please return to the Memphis Conference Treasurer's office with registration payment.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Spouses Name: \_\_\_\_\_

Number of attendees: \_\_\_\_\_

Address: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Registration Fee: Couple \$25.00  
Individual \$15.00

Amount enclosed: \$ \_\_\_\_\_

Indicate Meat, Cheese, Bread and Beverage for each box lunch.

(1) Box Lunch: \_\_\_\_\_

Beverage: \_\_\_\_\_

(2) Box Lunch: \_\_\_\_\_

Beverage: \_\_\_\_\_

SATURDAY, SEPTEMBER 25, 2004

9:30 Arrival and fellowship

## MORNING SESSION

10:00 Road Trip! Destination:  
Financial Security  
GBOPHB: Mary Figueredo

12:00 LUNCH:

## AFTERNOON SESSION

12:30 Legal Affairs in Retirement:  
The Rev. Tim Atkins

1:30 Taxes: Social Security, Clergy  
Exclusions and Deductions:  
(James will contact speaker)

2:30 BREAK

2:45 Insurance Presenter:  
ABS: Teresa Ferguson

3:45 Transitional issues for clergy and  
spouses:  
Dr. Dave and Patsy Hilliard

4:45 Retiree Association:  
The Rev. Russell Gallimore

5:00 Questions, Answers, Discussion

5:30 Adjourn

## Pension Projections:

You may request a pension projection by contacting the General Board of Pensions of the UMC or you may generate your own report via this website, [www.gbop.org](http://www.gbop.org). They also have prepared a short set of instructions for those who may have questions about using the calculator.

Note: Participants who have Pre-82 funds and/or are over age 70 should contact the Participant Response Center (PRC) for help with their projections. The PRC telephone number is 800-851-2201 choose option #4.

If you desire a pension projection please process this request ASAP and bring your pension projection to the seminar with any questions you may have.

## Jason's Deli Box Lunch

Type of Sandwich & Bread Choice

Meat: ham, turkey, roast beef, tuna salad, chicken salad, BBQ beef

Cheese: Swiss, American provolone, cheddar, fat-free mozzarella

Bread: white, wheat, French

PB&J White \_\_\_\_ Wheat \_\_\_\_

Beverage: Coke, Diet Coke, 7 Up,  
Dr. Pepper, Diet Dr. Pepper, Sprite