

12% PASTOR PENSION RECEIPT FORM REPORTING PROCEDURES

PASTORAL REPORT FORM

1. A 12% Receipt Form should be submitted with the Pastoral Report Form to the Joint Board of Finance at the annual conference
2. The amount of 12% Pension Funds submitted for the conference year must match the amount listed on the Pastoral Report Form.
3. If a Pastoral Report Form lists an amount in the 12% field and you did not receive/receipt the church for that amount (it was not paid), draw a line through the amount, write "0", initial and date the change.
4. If a Pastoral Report Form lists an amount in the 12% field and it is a different amount than the 12% Receipt Form(s), change the amount on Pastoral Report Form, initial, and date the change

PENSION ENROLLMENT FORM

1. Each pastor must complete a Pension Enrollment Form and submit to the CME Department of Personnel Services in order to become an active participant in the pension program. Contact the CME Department of Personnel Services for forms.

PERSONAL INFORMATION CHANGES

1. Pastors who have changes to their name, beneficiary or mailing address during the conference year should contact the Department of Personnel Services to update their records.

PASTOR

1. A 12% Pastor Pension Fund Receipt Form should be completed by the church treasurer before submitting to the Presiding Elder.
2. The pension check should be made payable to the annual conference.
3. Check amount should match amount on 12% Pastor Pension Fund Receipt Form
4. Verify that 12% Receipt Form is complete with all required signatures and dates before submitting to Presiding Elder
5. Verify that the amount of 12% paid for the year is inserted on the Pastoral Report Form.
6. NOTE: Only insert total amount of 12% pension **paid** for the year on the Pastoral Report Form.

PRESIDING ELDER

1. Verify that the amount on 12% Pension Fund Receipt Form matches amount submitted
2. The check should be made payable to the annual conference.
3. Verify that the 12% Pension Fund Receipt Form is complete
4. After you approve and sign 12% Pension Receipt Form, distribute copies as listed on form: original should be submitted to the bishop, a copy to the church, joint board and presiding elder.
5. Verify that the amount of 12% pension paid for the year is included on the Pastoral Report Form
6. If a different amount is submitted on the Pastoral Report Form, the Presiding should make the correction, initial and date the change.

PENSION CLERK

1. Due to the confidential nature of the pension records, this task should be handled by a person who is responsible, trusting, and can commit to confidentiality.
2. Once the Joint Board of Finance balances 12% Pension Funds, the Pension Clerk should receive from the Joint Board of Finance a list, by district, with the following information. Pastor name and amount of 12% pension paid.
3. The Pension Clerk will compare the list received from the Joint Board of Finance to the 12% Pension Fund Form and the 12% Pension Paid field on the Pastoral Report Form.
4. If there are discrepancies, the Pension Clerk should confer with the Joint Board. The Joint Board will discuss discrepancy with Presiding Elder. NOTE: The Presiding Elder is the only person authorized to make changes on the 12% Pension Fund Form or the Pastoral Report Form. If changes are made by the Presiding Elder, the change must be initialed and dated by the Presiding Elder. At the close of the annual conference, the Pension clerk will submit a grand total to the Seventh Episcopal District Pension Clerk.
5. THE PENSION CLERK IS NOT AUTHORIZED TO MAKE CHANGES ON THE 12% PASTOR PENSION RECEIPT FORM.
6. THE PENSION CLERK IS NOT AUTHORIZED TO REMOVE ANY FORMS OR REPORTS PERTAINING TO 12% PENSION FROM THE JOINT BOARD ROOM.

JOINT BOARD OF FINANCE

1. The Joint Board of Finance should only accept 12% Pension Receipt Forms from the Presiding Elder.
2. Verify that the amount of 12% Pension Funds submitted on Pastoral Report Form matches amount on 12% Pastor Pension Receipt Form
3. If there is a difference in amounts between the Pastoral Report Form and the 12% Pastor Pension Receipt Form, the Joint Board member must have the Presiding Elder change, initial, and date the form (whichever form is in error).
7. After records have been verified and balanced, the Joint Board of Finance should submit to the Pension Clerk a list, by district, with the following information: pastor name and amount of 12% paid.
8. At the close of the annual conference, the chairman of the Joint Board of Finance shall submit a copy of the list of pastors and 12% amount to the Seventh Episcopal District Pension Clerk.
9. At the close of the annual conference, the chairman of the Joint Board of Finance shall submit a copy of the Annual Conference Year End Report to the Seventh Episcopal District Pension Clerk.

ANNUAL CONFERENCE TREASURER

1. Once the annual conference treasurer and the Seventh Episcopal District Pension Clerk balances the 12% amount, the Seventh Episcopal District Pension Clerk will notify the presiding bishop. The 12% Pension Report and a check for the total amount will be submitted to the CME Department of Personnel.

PASTOR 12% PENSION RECEIPT FORM

CHRISTIAN METHODIST EPISCOPAL CHURCH
SEVENTH EPISCOPAL DISTRICT

CAROLINA REGION: ___ Charleston-Columbia ___ Durham ___ Winston-Salem/Greenville

NY-WASHINGTON REGION: ___ NY-New England ___ Philadelphia ___ Wash/VA

Date _____

Received from _____, the sum of \$ _____.
(Person Submitting Funds)

Check No. _____; Check Date _____; Cash \$ _____ for a

combined total of \$ _____, representing funds to be

deposited into the CME Pension Fund account for Rev. _____,

Pastor of _____ CME Church.

THE ABOVE LISTED 12% PENSION FUNDS WERE RECEIVED AS INDICATED FROM

Church Treasurer Printed Name

Church Treasurer Signature

Pastor Printed Name

Pastor Signature

PRESIDING ELDER SIGNATURE

Original: Presiding Bishop

Copy: Presiding Elder

Copy: Church

Copy: Joint Board of Finance

(DO NOT ALTER THIS FORM) Revised 12/14 hpm