Clergy Retirement Checklist

Checklist for an upcoming retirement:

• Call Pension Services at (800) 223-6602 at least three months before the date on which you plan to retire.

• Review the estimate of your retirement benefits.

• Complete and sign and have your canonical bishop (or, in the bishop's absence, the Ecclesiastical Authority) sign the retirement application. No retirement benefits will commence any earlier than the first day of the month following receipt of the written retirement application by CPF, except for certain limited exceptions applicable only to a disability retirement.

• Choose a benefit level for your surviving spouse or other beneficiary (and obtain spousal consent, if required). Remember, the loss of the housing allowance exclusion after your death may affect the taxable amount of the survivor's benefit that is payable to your surviving spouse or other beneficiary

• Make sure that assessments are fully paid prior to your retirement. No assessments will be accepted by CPF after your benefit commencement date. In addition, adjustments to your compensation record cannot be made after the benefit commencement date.

• If eligible, consider electing the Medicare supplement option for you and your eligible spouse.

• Contact the Social Security Administration at (800) 772-1213 and request an estimate of benefits, or visit the Social Security Administration's website at www.ssa.gov.

• Call Pension Services to discuss options if there is a change in marital status.

• Attend a conference or webinar to learn more about your upcoming retirement by reviewing the Conference & Virtual Event List from cpg at https://www.cpg.org/active-clergy/retirement/planning-for-retirement/conferences/

Please contact Jeff Mills jmills@episcopalpartnership.org or Maria Manocchio maria@episcopalpartnership.org if you have any questions