

Employer Adoption Agreement The Church Pension Fund Clergy Pension Plan

Use this form to:

Adopt The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan) for your organization

Who should complete the form:

An authorized representative of (i) a religious order or (ii) an organization that is associated with The Episcopal Church (but not subject to the authority of the Church) that, in either case, wishes to adopt the Clergy Pension Plan for all eligible¹ clergy serving at that organization

Note: An organization that is subject to the authority of The Episcopal Church (other than a religious order) is not required to complete this adoption agreement because the Clergy Pension Plan automatically will be adopted for that employer when it enrolls its first eligible cleric

Section 1 – Employer Information

Employer Name _____

Mailing/Billing Address _____

City _____

State _____

Zip Code _____

Country _____

Phone Number _____

Email Address _____

Plan Adoption Effective Date² _____

Section 2 – Employer Acknowledgements and Signature

By signing below, the above-referenced employer:

- certifies that it is both associated with The Episcopal Church and also a not-for-profit organization under section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and that it will immediately notify The Church Pension Fund (CPF) in writing if either status changes;
- acknowledges and agrees that it must enroll in the Clergy Pension Plan all eligible clergy (as determined by the terms of the Clergy Pension Plan) who are (or were) serving at the employer during the period beginning on the plan adoption effective date above and thereafter;
- acknowledges and agrees that monitoring eligibility and reporting compensation (in each case, in accordance with the terms of the Clergy Pension Plan) is not the responsibility of CPF but solely that of the employer;
- understands that CPF retains the right to request supporting documentation at any time to verify the details of a cleric's service at the employer;
- acknowledges that it is enrolled in a separate plan that is sponsored by CPF and that CPF can amend the plan at any time, without notice and for any reason;
- acknowledges that (i) it may only completely discontinue contributions under the Clergy Pension Plan (and thereby terminate its participation) as of the last day of a calendar year, and (ii) the rights of all of its employees to benefits accrued as of such date under the Clergy Pension Plan, to the extent then funded, will immediately become fully nonforfeitable by reason of such discontinuance/termination; and
- indemnifies and agrees to hold CPF and its affiliates, the benefit plans maintained by CPF and its affiliates, and all trustees, officers, employees, agents, plan administrators, fiduciaries, representatives, participants and beneficiaries thereof harmless from any and all liability, damages, costs (including, without limitation, attorney's fees and costs of investigations and defense), taxes and penalties arising from any violations of this Section 2.

Employer's Authorized Signature _____

Date _____

Print Name _____

Title _____

¹ Eligibility is determined solely by the terms of the Clergy Pension Plan.

² If a retroactive date is used, the employer is required to enroll every eligible cleric who is or was serving during the applicable time period (including a cleric who may no longer be serving at the employer). Interest may be charged on any past due assessments in accordance with the Clergy Pension Plan.

Submit the completed and signed form to:

The Church Pension Fund, 19 East 34th Street, New York, NY 10016, Attn: Client Services or email to admin-assist@cpg.org.
Please retain a copy of this form for your records. If you have any questions, call us at (866) 802-6333, Monday to Friday, 8:30AM to 8:00PM ET (excluding holidays).

To enroll an eligible cleric in the Clergy Pension Plan:

Once your organization has adopted the Clergy Pension Plan, you can do this online through [My Admin Portal](#) (MAP).