

Clergy: Termination Checklist

Please note: You must review and report changes in *My Admin Portal (MAP)*.

Clergyperson name: _____ Date of termination: _____

Employer name: _____ City: _____

This checklist and the guidelines on the following pages provide general directions for when a clergyperson’s employment is terminated and how it affects benefits provided by The Church Pension Fund and its affiliates (referred to as “the Church Pension Group” or “CPG”).

This checklist and guidelines can help you to

1. provide direction on where to obtain detailed benefit plan information, and
2. terminate plan participation and benefit coverage, including, as applicable, any Church Pension Fund retirement plan and group health, life, and disability coverage.

Note that this checklist and guidelines are for termination prior to retirement. Please refer to the separate retirement checklist and guidelines for information relating to the clergyperson’s retirement.

Use this table to track progress on benefit terminations.

Plan/Products	Date communicated to clergyperson	Termination deadline	Date terminated
Group Medical Coverage*			
Group Dental Coverage			
Group Life Insurance			
Disability Coverage:			
Short-Term Disability			
Long-Term Disability			
The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan)			
The Episcopal Church Retirement Savings Plan (RSVP)			
Other products			
Supplemental Group Life Insurance			
Annuities	<i>No change needed upon termination.</i>		
Individual Life Insurance			

**Medical Coverage generally includes prescription drugs, vision, Employee Assistance Program, Health Advocate, global travel assistance, and hearing health care. Unless otherwise noted, websites referenced herein that are outside the cpg.org domain are not associated with CPG, and CPG is not responsible for the content of any such website.*

This material is provided for informational purposes only and should not be viewed as investment, tax, or other advice. It does not constitute a contract or an offer for any products or services. In the event of a conflict between this material and the official plan documents or insurance policies, any official plan documents or insurance policies will govern. The Church Pension Fund (“CPF”) and its affiliates (collectively, “CPG”) retain the right to amend, terminate, or modify the terms of any benefit plan and/or insurance policy described in this material at any time, for any reason, and, unless otherwise required by applicable law, without notice.

Clergy: Termination Guidelines

Manage a clergyperson’s employment termination from your institution in My Admin Portal (MAP).

- Employee benefits administrators who do not have access to MAP may request access from their organization’s Institution Administrator or from a diocesan organization’s Diocesan Administrator who has access to MAP.
- Please call Client Services at (855) 215-5990 if you do not know who that person is.
- Upon termination of employment, enrollment in all employee benefits automatically ends.
- It is recommended that Institution Administrators inform the institution’s Diocesan or Group Administrator of the individual’s end of employment and benefits.

Group Medical/Dental

Deadline: within 30 days from date of termination

1. If clergyperson was eligible for medical/dental benefits, provide clergyperson with medical and/or dental Extension of Benefit information	<ul style="list-style-type: none"> • Explain to the clergyperson that an Extension of Benefits through The Episcopal Church Medical Trust may be offered for 36 months. • Extension of Benefit offer letters will be sent to the clergyperson upon notification of coverage termination. • Direct the clergyperson to call Client Services for more information on Extension of Benefits for medical and dental plans at (800) 480-9967, Monday to Friday, 8:30 AM to 8:00 PMET.
2. Necessary actions	<ul style="list-style-type: none"> • Institution or Diocese Administrators terminate the clergyperson’s employment using MAP.

Review [The Episcopal Church Medical Trust Administrative Policy Manual](#) or refer to your Diocesan/Group Administrator for additional details on the Medical Trust’s policies and eligibility guidelines.

Refer to [Health Benefits for Active Clergy](#) for additional plan details.

This material is not a substitute for professional medical advice or treatment. CPG does not provide any healthcare services and, therefore, cannot guarantee any results or outcomes. Always seek the advice of a healthcare professional with any questions about your personal healthcare, including diet and exercise.

Employer-Provided Group Life

Deadline: within 60 days from date of termination

1. Provide clergyperson with group life insurance information	<ul style="list-style-type: none"> • The clergyperson will receive a conversion letter from Church Life Insurance Corporation (Church Life) with the option to convert any active group life insurance coverage into an individual life policy.
2. Necessary actions	<ul style="list-style-type: none"> • Institution or Diocese Administrators terminate the clergyperson’s employment using MAP.

Church Life Insurance Corporation, NAIC No. 61875, a New York life insurance company, with its home office located at 19 East 34th Street, New York, New York 10016 (“Church Life”), offers group and, in certain circumstances, individual life insurance and annuities to clergy and lay employees, and their families, in the service of The Episcopal Church. Product availability and features may vary by state, and products may not be available in all states. Church Life is not licensed in all states. Any and all guarantees by Church Life are based on and expressly subject to the claims-paying ability of Church Life. The Church Pension Fund does not guarantee the payment of principal of or interest on any Church Life insurance policy or annuity contract. Information and descriptions of products and services are provided solely for general informational purposes and are not intended to be complete descriptions of, or to create a contract or an offer to provide, coverage. For complete details of coverage, including exclusions, limitations and restrictions, please see the actual life insurance policy or annuity contract. If any description of a Church Life product conflicts with the terms of the actual life insurance policy or annuity contract, then the terms of such life insurance policy or annuity contract will govern.

Short-Term Disability

Deadline: None

1. Provide clergyperson with Clergy Pension Plan disability coverage information	<ul style="list-style-type: none">• Eligibility for short-term disability benefits will terminate six months after the last required assessment payment is made to the Clergy Pension Plan. The clergyperson may have the option of extending the eligibility period for this benefit by paying personal assessments to the Clergy Pension Plan after termination of employment.• Direct the clergyperson to call Client Services for more information about this option at (866) 802-6333, Monday to Friday, 8:30 AM to 8:00 PM ET.
2. Necessary actions	<ul style="list-style-type: none">• Short-term disability coverage through the Church Pension Plan is automatically terminated when the clergyperson is no longer eligible for the benefit.• Terminations for either Employer-Paid or Employee-Paid (Voluntary) coverage can be handled as followed:<ul style="list-style-type: none">– Institution or Diocese Administrators terminate the clergyperson's employment in MAP.

Review [A Guide to Clergy Benefits](#) for additional plan details.

Long-Term Disability (LTD only)

Deadline: Immediate

1. Provide clergyperson with disability coverage information	<ul style="list-style-type: none">• Eligibility for long-term disability benefits will terminate six months after the last required assessment payment is made to the Clergy Pension Plan. The clergyperson may have the option of extending the eligibility period for this benefit by paying personal assessments to the Clergy Pension Plan after termination of employment.• Direct the clergyperson to call Client Services for more information about this option at (866) 802-6333, Monday to Friday, 8:30 AM to 8:00 PM ET.
2. Necessary actions	<ul style="list-style-type: none">• Long-term disability coverage through the Church Pension Plan is automatically terminated when the clergyperson is no longer eligible for the benefit.• Terminations for either employer-provided or voluntary coverage can be handled as follows:<ul style="list-style-type: none">– Institution or Diocese Administrators terminate the clergyperson's employment in MAP.

Review information on the [Long-term Disability Plan](#) for the Clergy Pension Plan.

Short-term disability and long-term disability insurance products and services are offered by American Family Life Assurance Company of New York, NAIC No. 60526. The information provided here is a summary of the group disability income insurance coverage and is for illustrative purposes only. A certificate with more complete policy information is available upon request. Please refer to the certificate or the group policy for a complete description of coverage, terms, conditions, exclusions, and limitations. If any conflict exists between the certificate and/or policy and the information described here, the terms of the certificate and policy will govern. Other self-funded disability benefits may be provided by The Church Pension Fund.

Clergy Pension Plan

Deadline: within 30 days from date of termination

1. Provide clergyperson with the Clergy Pension Plan information	<ul style="list-style-type: none">• The clergyperson may be offered the option to earn credited service by paying their own assessments for up to 24 months. A letter will be sent to the clergyperson by The Church Pension Fund upon notification of employment termination.• Direct the clergyperson to contact Client Services at (866) 802-6333, Monday to Friday, 8:30 AM to 8:00 PM ET for any questions regarding how the benefits provided through the Clergy Pension Plan will be affected upon termination of employment.• Refer to A Guide to Clergy Benefits for complete plan details.
2. Necessary actions	<ul style="list-style-type: none">• Institution or Diocesan Administrators terminate the clergyperson's employment using MAP. <p>Note: All retirements are effective the first of the month. Assessments will be charged through the end of the month prior to the termination effective date.</p>

Review [A Guide to Clergy Benefits](#) for additional details on the Clergy Pension Plan.

RSVP

Deadline: within 30 days from date of termination

1. If enrolled, provide clergyperson with the RSVP information	<ul style="list-style-type: none"> • The clergyperson may not participate in the RSVP unless they are actively employed within The Episcopal Church or self-employed and serving The Episcopal Church. • Direct the clergyperson to the RSVP & Lay DC Plan Employee Guide for information on the available distribution options. • Direct the clergyperson to call Fidelity for distribution information at (877) 208-0092, Monday to Friday, 8:30 AM to 12:00 AMET.
2. Necessary actions	<ul style="list-style-type: none"> • Institution or Diocesan Administrators terminate the employment using MAP. • Ensure that all contributions are sent to Fidelity prior to terminating employment using MAP.

Review the [RSVP & Lay DC Plan Employee Guide](#) for additional RSVP details.

Other employee products

Deadline: Varies

Supplemental Life	<ul style="list-style-type: none"> • The clergyperson will receive a conversion letter from Church Life with the option to convert any active group life insurance coverage into an individual life insurance policy.
Annuities and Individual Life	<ul style="list-style-type: none"> • If applicable, update beneficiary information by completing the Life/Annuities Beneficiary Form — Group & Individual Life and Annuities Only form.

Individual life insurance is offered through Church Life Insurance Corporation ("Church Life") and underwritten by Protective Life and Annuity Insurance Company ("Protective Life"), NAIC No. 88536, which is located in Birmingham, Alabama. Product availability and features may vary by state. Protective Life has sole responsibility for all financial obligations in connection with its products. Neither Church Life nor any of its affiliates has any responsibility or liability whatsoever for the obligations of Protective Life. Neither Church Life nor any of its affiliates is affiliated with ProtectiveLife.

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