

# 3 “L” Academy

Learning, Living, and Leading Stewardship by Connecting  
& Sharing Your Time, Talents, Gifts, Service, & Witness



Sponsored by:  
Mississippi Conference Board of Pension



*August 19-20, 2019*  
*Hilton Jackson, County Line Road, Jackson, Mississippi*

The academy will provide an opportunity to explore clergy benefits, financial planning, stewardship education, and connectionalism as the participant leads the denomination in Mississippi and to accomplish the mission of The United Methodist Church: The mission of the Church is to make disciples of Jesus Christ for the transformation of the world. Local churches provide the most significant arena through which disciple-making occurs.

The Mississippi Conference Board of Pension is pleased to present a two-day educational session where we plan to assist clergy in modeling and teaching the United Methodist commitment to fully utilizing their time, talents, gifts, service, and witness.

### *Session Descriptions*

1. **Setting and Monitoring Financial Goals** – *John Garrison, Ernst & Young Financial Planner* This class will be packed full of simplified and practical ways to take full command of your financial wellness, including: Setting and living into your financial goals, Discovering and using financial management tools and resources, and Planning for a secure retirement. You will learn how to enroll in the EY process that is provided free of charge by Wespath.
2. **United Methodist Benefits Review** – *Ron Coleman, Wespath* The United Methodist Church offers many benefits to its clergy. This class will explain what benefits you may expect from the Church when you retire.
3. **Unexpected Events: Benefits You Need the Most** – *Carrie Persiwale, Wespath* What happens when life throws you a curve and you face a difficult situation involving disability or incapacity? Learn how the Comprehensive Protection Plan (CPP) helps through unplanned transitions. In this class, you will learn “what to do” and “what to expect” at those times when you and your family need benefits the most.
4. **Making a Difference: Personal Savings and Wespath Services** – *Wespath Representative* Making personal contributions into the United Methodist Personal Investment Plan (UMPIP) is key to enhanced retirement security. Learn ways to maximize your saving potential, as well as how to tailor your investments with LifeStage Investment Management to reflect your needs and personal circumstances. You'll also learn more about Benefits Access—the online portal to your accounts at Wespath. UMPIP, LifeStage and Benefits Access are available to both clergy and lay employees.
5. **Mississippi Clergy Compensation and Benefits Update** – *David Stotts, CPA Conference Treasurer* This session will review the 2020 Clergy Budget Compensation form and changes that will be found on it. We will look at the tax implications of each line and discuss any proposed or enacted tax law that is coming before us. Changes in benefits will also be discussed.
6. **Clergy Couple Housing** – *Rev. Mike Hicks, Executive Director of the Mississippi United Methodist Foundation and Chair of the Conference Equitable Compensation Commission* This class will be of specific interest to clergy couples as to how housing for benefits and for equity work together. The Equitable Compensation Commission proposed new rules and annual conference affirmed those rules this year.
7. **Cultivating Stewardship & Generosity** – *Melvin Amerson, Texas Methodist Foundation* Celebrating the Offering is a workshop for pastors and church leaders of small and large churches who want to rekindle the offertory time during worship. Ideas will be shared to create an atmosphere of celebration and extravagant generosity during the offering. Developing a Culture of Generosity is designed for pastors and church leaders of small and large congregations who want to cultivate a culture of *Extravagant* and *Fruit-filled* Generosity in their local church. Year-Round stewardship ideas and strategies will be offered to develop congregations of generous people.

8. **Buying a Home—Looking Toward Retirement** – *Ellen Short, Realtor* The time is going to come when you will need to buy a home. Whether it is now or in the future, there is no better time than now to begin to understand the process and what you will need to consider when doing so.
9. **Legacy Wealth Planning** – *Ronald C. Morton, J.D., LL.M.* We'll discuss subjects most of us would rather avoid: death, disability, and taxes. Many people do not give a thought to the certainty of their own death; yet it will happen to each and every one of us. Then what happens?
10. **Social Security** – *Heather Darby, Social Security Administration* Discovering and then incorporating several financial management tools. This session will help prioritize and balance financial goals. Question and answer period about deploying resources including investment questions will conclude this break-out session.

TIME	SESSION CONTENT
<b>Monday, August 19, 2019</b>	
8:00 - 8:30 a.m.	Continental Breakfast and Fellowship
8:30 - 10:00 a.m.	Session 1 – Plenary Financial Planning - John Garrison of EY
10:00 - 10:15 a.m.	Break
10:15 a.m. - 12:00 p.m.	Session 2 – Plenary UM Benefits Review - Ron Coleman
12:00 - 1:00 p.m.	Lunch
1:00 - 2:15 p.m.	Session 3 – Plenary Unexpected Events: Benefits You Need the Most - Carrie Persivale
2:15 - 3:45 p.m.	Session 4 – Making a Difference: Personal Savings and Wespath Services - Wespath Representative
3:45 - 4:00 p.m.	Break
4:00 - 5:00 p.m.	Session 5 – Plenary Mississippi Clergy Compensation and Benefits Update - David Stotts
	Dinner and Evening on your own
<b>Tuesday, August 20, 2019</b>	
7:30 - 8:00 a.m.	Continental Breakfast and Fellowship
8:00 - 9:00 a.m.	Session 6 – Plenary Clergy Couple Housing - Mike Hicks
9:00 - 10:15 a.m.	Session 7 – Plenary Cultivating Stewardship and Generosity - Melvin Amerson
10:15 - 10:30 a.m.	Break
10:30 - 11:45 a.m.	Session 8 – Plenary Buying a Home—Looking Toward Retirement - Ellen Short
11:45 a.m. - 12:45 p.m.	Lunch
12:45 - 2:00 p.m.	Session 9 – Plenary Legacy Wealth Planning - Ron Morton
2:00 - 3:00 p.m.	Session 10 – Social Security - Heather Darby
3:15 - 3:30 p.m.	Break
3:15 - 4:30 p.m.	Closing Worship - Bishop James E. Swanson, Sr.

# 3 “L” Academy Registration Form

Or Register Online at [www.mississippi-umc.org](http://www.mississippi-umc.org)

**August 19-20, 2019**

*Hilton Jackson, County Line Road, Jackson, Mississippi*

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

Will spouse attend? \_\_\_\_\_ If yes, spouse's name: \_\_\_\_\_

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

District: \_\_\_\_\_ Church Name: \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

## Registration:

## Cost

## Enclosed

Attendee ..... \$40 .....\$ \_\_\_\_\_

Spouse ..... \$25 .....\$ \_\_\_\_\_

Total: \$ \_\_\_\_\_

**Mail to Mississippi Conference UMC - 3 “L” Academy, 320-A Briarwood Dr., Jackson, MS 39206**

Contact David Stotts at **769-243-7020**, if you have any questions concerning registration or program.

*For hotel reservations at the site of the 3 “L” Academy, contact the Hilton Jackson at 1-888-263-0524. Ask for a room in the United Methodist Church block and use the block code UMCC3L. The hotel is located at 1001 East County Line Road, Jackson, Mississippi.*