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October 2018



Future Financial Security Starts Early

Recent retiree The Reverend Steve Mitchell shares learnings from his career and advice for preparing for the future as a participant in Wespath-administered retirement plans.

[Read More...](#)



Commission on a Way Forward Report—Wespath Appendix

Wespath was asked to analyze the three proposed plans brought forward by the Commission on a Way Forward to understand the potential impact on Church retirement plans. The Commission's report to the Special General Conference 2019 included these insights in the Wespath appendix.

[Read More...](#)



Down with Debt

Debt is a significant reason for delayed retirement saving. Debt repayment strategies can help you get a handle on what you owe, so that you can focus on your financial future.

[Read More...](#)

Poll: Is Debt Bringing Your Savings Down?



[Take Poll...](#)

Last Month's Poll Results

In the last issue, we asked how much you thought retirement would cost. **The majority (45%) expected to need \$1-2 million.**



Action Needed: Is it Time to Take Your Required Minimum Distribution (RMD)?

Did you turn 70½ this year? It might be time for your RMD!

[Read More...](#)



News Flash: Wespath Joins Archbishop in Low-Carbon Transition Summit

Wespath joined the Archbishop of Canterbury, Justin Welby, and global sustainable investment leaders for the Transition Pathway Initiative's (TPI's) first Asset Owners State of Transition Climate Summit, **July 2** in London.

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Did You Know: General Secretary Contributes Column for Circuit Rider

Circuit Rider's "[Decision 2019](#)" [issue](#) (August-October 2018) offers diverse voices on the pivotal decisions facing UMC General Conference 2019 delegates, including a column from Wespath's General Secretary Barbara Boigegrain. It's a worthwhile read for UMC clergy, lay and members—available online at ministrymatters.com/circuit_rider.



Principled Fund Management: Low-Carbon Transition

Wespath believes public policies, emerging technologies and physical impacts associated with



Dimensions Newsletter: Improve Your Well-Being

The Center for Health newsletter has a new name: *Dimensions*. In the October issue, we spotlight



Moving Expense Explainer Video Now Available

A change to tax law means that moving expense payments are now subject to income tax and

concerns about climate change are creating winners and losers across companies, industries and countries, impacting investment returns. As prudent fiduciaries, we must assess these global risks and opportunities in the management of our funds.

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Global Ministries' Abundant Health, explain Faith Activity Nutrition and share inspiring stories. Visit wespath.org/benefits/newsletter.

SECA taxes—whether made directly to a moving company or reimbursed to you. Wespath developed a video to help explain the law. View the video and other helpful resources at wespath.org/moving_expenses.



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Our address is 1901 Chestnut, Glenview, IL 60025