2011/2012 Instruction Sheet

Before-Tax/After-Tax Contributions Agreement Form
Complete & keep in church file

Billing Change Form: Complete & fax or send to the Conference Benefits Office (Mitchell)

IF YOU ARE NOT MAKING ANY PERSONAL CONTRIBUTIONS THESE FORMS DO NOT NEED TO BE COMPLETED

(1) The Before-Tax and After-Tax Contributions Agreement to the United Methodist Personal Investment Plan (UMPIP) form:

Complete Part 1
Complete Part 2 if on a Before-Tax (Tax Deferred) basis
Fill in the **total monthly dollar amount**
OR
Complete Part 3 if on an After-Tax (Currently Taxed) basis
Fill in the **total monthly dollar amount**

Specify the month, day and year this agreement starts. **You, the pastor, will need to sign and date part 4 before the effective date of the agreement**. Also, have **your treasurer sign and date part 5 before the effective date of the agreement.**

The Before-tax and After-tax Contributions Agreement to the United Methodist Personal Investment Plan (UMPIP) form has to be completed and kept on file with the church. Anytime you make changes on the amount you contribute, or you move to a new appointment; a new agreement will need to be completed and kept on file at the appointed church.
Do NOT send the agreement to the General Board! This is your documentation to prove you have this agreement in place if you were ever audited.

(2) The **Billing Change Form**: Complete the participant information in the "instructions" section and do not be concerned about the employer #. Then complete pastor's name, ss# and effective date – which should be the same as on your before-tax/after-tax contribution agreement.
Then indicate how much the church should be billed each **month** on either the "before-tax" or "after-tax" line. Remember **to note the MONTHLY amount on the billing form – not the annual amount.**

URGENT! Major Change - Send the billing change form to the Conference Benefits Office in Mitchell along with the Clergy Compensation form via your District Superintendent or mail to: Dakotas Conference Attn: Leana PO Box 460 Mitchell SD 57301.

Please Note! The General Board of Pension WILL NOT bill the church correctly unless you send the completed form in to the Conference Benefits Office, so it can be updated into the General Board system.

Anytime you make changes on the amount you contribute, or you move to a new appointment; a new agreement will need to be completed and kept on file at the church. A new billing form will need to be completed and faxed (605-996-0827) or sent to the Conference Benefits office to be entered into the General Board system, so they know what to bill the church.

After charge conference meets in the fall of 2011, if you are making any personal contributions remember to complete a new before-tax/after-tax agreement and billing change form for 2012. If you have any questions about either of these two forms contact Leana Stunes at (605) 996-6552 or leana.stunes@dakotasumc.org .