



# Steps to Follow When Calling a New Pastor



The calling of a new minister often causes a flurry of paperwork. We understand these transitions can be hectic, but please remember to keep Pension Fund in the loop. Both the church and new minister will need to notify Pension Fund of a change in employment, so we can adequately update retirement accounts and invoices.

So, what should happen when a new minister is called? Here are action items churches and ministers should follow:

## For churches:

- When a minister leaves a church position, the church should notify Pension Fund of the minister's name, last date of service and date of final dues payment. The church treasurer/remitting officer may provide this information in the "Special Instructions" section of the invoice. Upon receipt of this information, Pension Fund will remove the minister's name from the invoice.
- While preparing to extend a call to another minister, church leadership should review and update their Pension Fund Participation Agreement (PA). The PA is a legal document declaring what benefit options you as an employer will provide.
- When a minister accepts a call, the church should work with their minister to complete either a 'Change of Employer Form' or 'Pension Plan Enrollment Form' and submit with their first dues payment. After the enrollment form and payment have been processed, the church will receive a monthly invoice for use in submitting future payments.
- To avoid confusion and potential errors in processing contributions, churches should not use an invoice from their minister's previous employer or a minister's individual billed invoice.

## For ministers:

- Ministers who are Pension Plan members with no gap in contributions should complete a Change of Employer Form.\* Pension Fund uses this form to set up the invoice for the new church.
- Ministers who are Pension Plan members where there will be a gap between calls should complete and submit a Ministerial Member Options for Pension Plan Membership Form.\* Using this form, ministers may make arrangements to pay pension dues personally for a short period of time in order to keep their Pension Plan membership active. We use this form to set up an individual billed invoice.
- Ministers who have not yet enrolled or whose Pension Plan account is inactive must complete an Pension Plan Enrollment Form.\* Submitting the enrollment form along with the initial payment of pension dues will expedite the enrollment process.
- To ensure pension dues payments are applied to correct accounts, ministers should not give their individual billed invoice to the treasurer/remitting officer at the new church.

\*All resources listed above can be found on Pension Fund's website, [www.pensionfund.org](http://www.pensionfund.org), under Resources > Program Resources > Pension Plan.