

PENSION FUND OF THE CHRISTIAN CHURCH

BRIDGE

SPRING 2023

A photograph of two hikers standing on a grassy mountain ridge. The hiker on the left is a man wearing a black beanie, a plaid shirt, blue jeans, and a large green backpack. The hiker on the right is a woman wearing a red long-sleeved shirt, black leggings, a black beanie, and a blue and black backpack. She has her arms raised in a gesture of triumph or joy. They are both looking out over a vast, hilly landscape with a river winding through the valley below. The sky is filled with soft, golden light, suggesting a sunrise or sunset. The overall mood is one of adventure and achievement.

*Bright
futures.*
**MADE
POSSIBLE.**

GENERAL
ASSEMBLY

JULY AUG.

29-1

LOUISVILLE, KY

Connection **MADE POSSIBLE.**

The world is getting more disconnected with every passing year, but at Pension Fund, we understand the value of connection. We are proud to serve our members by connecting them with what's possible. Whether that's showing them how to save for retirement, helping with a 13th check at Christmas, or walking alongside pastors to support their ministry with wellness resources like Learn to Live, we will be there. We can't wait to connect with you at General Assembly!

**PLAN AHEAD - SCHEDULE TIME TO MEET WITH YOUR
AREA DIRECTOR**

LEARN MORE AT:

WWW.PENSIONFUND.ORG/GA2023

SATURDAY

JULY 29 7:00 P.M.
13TH CHECK OFFERING
OPENING EVENING
SERVICE.

OR

GIVE ONLINE.
SCAN THE QR CODE
TO MAKE A
DONATION.



MONDAY

JULY 31 7:00 A.M.
PENSION FUND
BREAKFAST



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Keep In Touch

P.O. Box 6251
Indianapolis, IN 46206-6251

866.495.7322 TOLL FREE

317.634.4504 PHONE

317.634.4071 FAX

pfcc1@pensionfund.org

www.pensionfund.org

PensionFundChristianChurch

PensionFundCC

pensionfundcc

Pension Fund of the
Christian Church

Article Submissions

Share your ideas with us! Email
communications@pensionfund.org

Editorial Staff

Meagan Miller

*Assistant Vice President of Marketing
& Communications*

mmiller@pensionfund.org

Jessi Rueter

Sr. Content Marketing Manager

jrueter@pensionfund.org

Kate Hurst

Director of Client Relations Support

kateh@pensionfund.org

Jennifer Johnson

Graphic Designer

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will impact your individual situation.*



PRESIDENT'S MESSAGE

Made Possible By...



by Rev. Dr. Todd Adams President and CEO tadams@pensionfund.org

When I'm scrolling on social media, I love seeing posts from our retirees experiencing the financial security that Pension Fund affords them. Whether they are enjoying a trip, spending time with grandchildren, or even just having their daily needs met, seeing friends and colleagues thrive after trusting us with their retirement makes me so proud of the work that we do.

I OFTEN COMMENT, "Made Possible by Pension Fund," on their posts, especially if they're new retirees. And yet it is true. A strong, smart, and secure retirement makes a lot of things possible. Freeing our members from having to generate their own income in retirement and manage their investments is one of the many ways a secure retirement is made possible by Pension Fund.

The security we offer is made possible by faithful leaders who have served before me; staff who have been in the field; wise investors who took lessons from the Depression and applied them; board members who gave of and give of their time to ask important questions, pour over documents, and challenge us as staff to be better, to invest wisely, and to lead faithfully; and external auditors, actuaries, and legal counsel who keep us advised on the ever-changing landscape and regulatory environment.

Made possible, however, is as much about a secure retirement as it is about working well along the way. Over the past few years, we've doubled down on my predecessor Jim Hamlett's vision of Excellence in Ministry and financial literacy for pastors. We've added programs to support pastors, arming them not only with financial information but also with mental health resources and time together for rest, renewal, and education through The Gathering. We have partnered with Bethany Fellows to lead our small group experience. We sponsor Bethany Fellows to ensure this vital

ministry continues to serve pastors in their formative years as they work faithfully to keep people healthy and in ministry.

Made possible extends to our Ministerial Relief and Assistance (MRA) programs. From Parental Leave Grants that make extended bonding time possible to providing aid to pastors following natural disasters or those whose income is less than 200% of the federal poverty level in retirement, MRA has made an easier life possible for many along the way.

On the following pages, you will learn about the many ways we are working to make possible Pension Fund's varied ministries. In particular, I hope you'll read Rev. Gabriel Lopez's article about how we are intentionally engaging in our Diversity, Equity, Belonging, and Accessibility (DEBA) initiative that is working to ensure a culturally relevant retirement is made possible for all who serve in the Stone-Campbell (Restoration) Movement.

Together, we are on a mission made possible by you!





DEL PRESIDENTE

Hecho posible por...



by Rev. Dr. Todd Adams Presidente y CEO tadams@pensionfund.org

Cuando paso tiempo por las redes sociales, me encanta ver publicaciones de nuestros jubilados que están disfrutando de la seguridad financiera que les brinda Pension Fund. Ya sea poder disfrutar de un viaje, pasar tiempo con los nietos o simplemente satisfacer sus necesidades diarias, ver a amigos y colegas prosperar después de darnos la confianza de manejar sus cuentas de jubilación me hace sentir muy orgulloso del trabajo que hacemos.

A MENUDO COMENTO "Hecho posible gracias a Pension Fund" en sus publicaciones, especialmente si se jubilaron hace poco. Y sin embargo es cierto. Tener una jubilación sólida, sabia y segura hace que muchas cosas sean posibles. Liberar a nuestros miembros de tener que generar sus propios ingresos durante la jubilación y administrar sus inversiones es una de las muchas formas en que Pension Fund hace posible una jubilación segura.

La seguridad que ofrecemos es posible gracias a líderes fieles que han servido antes que yo. Personal que ha estado trabajando directamente con nuestros miembros. Inversionistas sabios que tomaron lecciones de la depresión y las aplicaron. Miembros de la junta ejecutiva que dieron y dan de su tiempo para hacer preguntas importantes, revisan documentos y nos retan como personal a ser mejores, a invertir sabiamente y a liderar fielmente. Auditores externos, actuarios y asesores legales que nos mantienen informados sobre los cambios constantes en el panorama y en el entorno regulatorio.

Hecho Posible, sin embargo, se trata tanto de una jubilación segura como de trabajar bien en el camino. En los últimos años, hemos duplicado la visión de mi predecesor, Jim Hamlett, de Excelencia en el Ministerio (Exelence in Ministry) y educación financiera para pastores. Hemos agregado programas para apoyar a los pastores, no solo brindándoles información financiera sino también recursos de salud mental y tiempo juntos para descansar, renovarse y educarse a

través de The Gathering. Nos hemos asociado con Bethany Fellows para liderar nuestra experiencia en grupos pequeños. Patrocinamos a Bethany Fellows para garantizar que este ministerio vital continúe sirviendo a los pastores en sus años de formación, mientras trabajan fielmente para mantener a las personas sanas y en el ministerio.

Hecho posible se extiende a nuestros programas de Ayuda y Asistencia Ministerial (MRA). Desde subsidios de permiso de paternidad que hacen posible un tiempo de vinculación prolongado hasta brindar ayuda a pastores después de desastres naturales o aquellos cuyos ingresos son inferiores al 200 % del nivel federal de pobreza en la jubilación, Ayuda y Asistencia Ministerial (MRA) les ha brindado ayuda a muchos a lo largo del camino.

En las siguientes páginas, aprenderá sobre las muchas formas en que estamos trabajando para hacer posible los diversos ministerios del Fondo de Pensiones. En particular, espero que lea el artículo del Rev. Gabriel Lopez sobre cómo nos comprometemos intencionalmente en nuestra iniciativa de Diversidad, Equidad, Pertenencia y Accesibilidad (DEBA) que está trabajando para garantizar que una jubilación culturalmente relevante sea posible para todos los que sirven en el Movimiento Stone-Campbell (Restauración).

¡Juntos, estamos en una misión hecha posible por ti!



DIVERSITY, EQUITY, BELONGING, AND ACCESSIBILITY

Possibilities for All



by Rev. Gabriel Lopez Director of DEBA glopez@pensionfund.org

Rev. Dr. Martin Luther King Jr. said, “It is not possible to be in favor of justice for some people and not be in favor of justice for all people.” As MLK day passed this year, we remember those whose passion and activism in the field of social justice built a better society for communities living in oppression, at the margins and in the shadows. As a Mexican immigrant residing in the U.S., I know that my quality of life and opportunities have been made possible by those who came before me: those who walked, endured, and sacrificed for access, inclusion, and justice.

MY EXPERIENCE AS AN IMMIGRANT, a congregational pastor serving an immigrant community, and an Area Director serving the Obra Hispana and North American Pacific/Asian Disciples (NAPAD) communities has reinforced what I know and has taught me new things about diversity, access, and inclusion. Diversity is beautiful as it brings different perspectives, experiences, and stories to the table. But as Anthony Jack, Assistant Professor at the Harvard

Graduate School of Education, says in his Ted Talk, “Access Ain’t Inclusion.” For several years, Pension Fund programs have been available to all persons and communities eligible to become members—but “Access Ain’t Inclusion.” As I know personally, and as I have learned from colleagues, there are challenges that prevent our Obra Hispana, National Convocation, and NAPAD communities from benefitting fully from Pension Fund programs.





So how is Pension Fund of the Christian Church working to make this possible now?

As part of our three-year strategic plan for Diversity, Equity, Belonging, and Accessibility (DEBA), Pension Fund of the Christian Church has engaged the organization P3 Development out of Milwaukee to assist us with market research. P3 Development designs strategic solutions to drive equitable and inclusive change. Within the strategic plan, and with the partnership of P3 Development, we plan to study the engagement and experience of communities of color who are Pension Fund members. We seek to learn the reasons why we are not accessible to some clergy and why we have historically underserved some communities.

This research is important to Pension Fund because these are new findings and are not based on old information.

As the new Director of Diversity, Equity, Belonging, and Accessibility, I will work closely with the President and CEO to direct the DEBA strategic initiative, provide DEBA training and resources for Pension Fund staff, coordinate the work of the Pro-Reconciliation/Anti-Racism team, and continue to build relationships with our racial/ethnic constituencies.

As an Area Director, one of my favorite parts of my job was to attend assemblies and hear the testimonies of clergy who had a great retirement made possible by Pension Fund. My hope is that this strategic plan creates new testimonies from clergy of all communities—especially those who have been underserved in the past.



DIVERSIDAD, EQUIDAD, PERTENENCIA Y ACCESIBILIDAD

Posibilidades para todos



by Rev. Gabriel Lopez Director de DEBA glopez@pensionfund.org

El reverendo Dr. Martin Luther King Jr. dijo: “No es posible estar a favor de la justicia para algunas personas y no estar a favor de la justicia para todas las personas”. A medida que pasó el día de MLK este año, recordamos a aquellos cuya pasión y activismo en el campo de la justicia social construyeron una sociedad mejor para las comunidades que son oprimidas, viven en los márgenes y en las sombras de la sociedad. Como inmigrante Mexicano viviendo en los EE.UU., sé que mi calidad de vida y algunas oportunidades han sido posibles gracias a quienes me precedieron; aquellos que caminaron, lucharon y se sacrificaron por el acceso, la inclusión y la justicia.

MI EXPERIENCIA COMO INMIGRANTE, pastor congregacional sirviendo a una comunidad inmigrante y como Director de Área sirviendo a las comunidades de la Obra Hispana y NAPAD, ha reforzado lo que sé y me ha enseñado cosas nuevas sobre la diversidad, el acceso y la inclusión. La diversidad es hermosa ya que trae diferentes perspectivas, experiencias e historias a la mesa. Pero como dice Anthony Jack, profesor adjunto de la Escuela de Graduados en Educación de Harvard

en su Ted Talk, “El acceso no es inclusión”. Durante varios años, los programas de Pension Fund han estado disponibles para todas las personas y comunidades que son elegibles para convertirse en miembros, pero “El acceso no es inclusión”. Como sé personalmente y por haber aprendido de colegas, existen desafíos que no permiten que nuestras comunidades de la Obra Hispana, National Convocation y NAPAD se beneficien completamente de los programas del Fondo de Pensiones.





Entonces, ¿cómo está trabajando Pension Fund of the Christian Church para que esto sea posible ahora?

Como parte de nuestro plan estratégico de 3 años para Diversidad, Equidad, Pertenencia y Accesibilidad (DEBA), Pension Fund of the Christian Church ha contratado a la organización P3 Development de Milwaukee para que nos ayude con la investigación de mercado. P3 Development diseña soluciones estratégicas para impulsar un cambio equitativo e inclusivo. Dentro del plan estratégico y con la asociación de P3 Development, planeamos estudiar la participación y la experiencia de las comunidades de color que son miembros de Pension Fund. Buscamos conocer las razones por las que no somos accesibles a algunos clérigos y por las que históricamente hemos desatendido a algunas comunidades.

Esta investigación es importante para Pension Fund porque se trata de descubrimientos nuevos y no se basan en información antigua.

Como nuevo Director de Diversidad, Equidad, Pertenencia y Accesibilidad - trabajaré en colaboración con el Presidente y Director Ejecutivo para dirigir la iniciativa estratégica DEPA (DEBA), proporcionar capacitación y recursos DEPA (DEBA) para el personal de Pension Fund, coordinar el trabajo del equipo de Pro-Reconciliación/Anti-racismo y continuar construyendo las relaciones con nuestros grupos raciales/étnicos.

Como Director de Área, una de mis partes favoritas de mi trabajo era asistir a las asambleas y escuchar los testimonios de los clérigos que tuvieron una excelente jubilación gracias a Pension Fund. Mi esperanza es que este plan estratégico genere nuevos testimonios del clero de todas las comunidades. Especialmente aquellos que han sido desatendidos en el pasado.

An Investment Strategy with You in Mind



by David Stone Chief Investment Officer davids@pensionfund.org

What a year we experienced in 2022. I wrote an article around this same time last year that focused on the beginning of the Russia/Ukraine war and the disruption it caused in the global financial markets. As that continued on—apparently indefinitely—the country turned its attention to the historically high increases in inflation and the beginning of the Fed's battle to try and tame it.

Political unrest here and abroad has been a constant theme as the gridlock and animosity in Washington dominated the news. The year ended with political changes at the state and U.S. House of Representatives levels. We also saw the Fed's seventh rate increase at the end of 2022, from 0.25% in January to 4.50% in December. The effect of all these issues on most individual portfolios has been a return of between -10%, for the more conservative funds, and -25%+ for more aggressive balanced products in the marketplace.

I've worked for Pension Fund for a long time, almost 30 years, in the finance and investment areas. One of the things that was taught to me from day one—and has been a focus for us over all these years—is that there are things that make our members different and unique. We know

that our members are hardworking people who spend most of their time taking care of the needs of others, whether members of the congregation, the students, the faculty, or the employees they serve. We appreciate that there are other more pressing matters to worry about on a day-to-day basis than those mentioned above, and we offer products with that in mind to provide a stable increase in value and the peace of mind that comes from knowing that members earn a positive return from the base rate even if the market is underperforming. Our members also benefit from times of good investment performance, as reflected in the Good Experience Credits.

It would be very easy for us to offer what most other firms do for their members or prospects. We could offer the ability to select from an endless array of mutual funds with every possible investment focus and leave the entire risk of loss as just your concern. But that's not who we are, and that's not who we'll ever be. Knowing who we serve is not about telling you what we think is best for you. We know each of us is different. It's about you telling us what it is that makes you worry a little bit less about your future and letting us help make that possible so that you can focus on what you do best: serving others.



Ask Your Money Line

 by Peter Dunn, AKA Pete the Planner



I know that building my savings is vital for my financial future, but these days it seems impossible, and I don't know how to. Do you have any tips and tricks for saving even when it feels impossible?

Saving for your future is essential to building a financially healthy life. However, we know it can be an uphill battle in the current economic climate. Here are three tips on prioritizing savings even when it feels hard.

1. Make a budget and stick to it.

Developing a budget and sticking to it is essential to ensure you live a financially healthy life. While it's hard to form habits and stick to your budget, you can do a few things. The keys to sticking to your budget are support and accountability. You need to identify your support system and establish your system for accountability to achieve success. First, let's look at how to begin budgeting.

To build your savings by budgeting, create a sense of urgency with saving money and make it fun. Simple strategies such as naming your accounts to align with your goals can be the mental shift you need to stick to it. For example, an emergency fund can be renamed "my financial peace and security fund." Budgeting will also help you identify any frivolous spending, which are the areas you need to reduce to achieve your goals. As you add up how much you spend in that area, think about where else that money can go.

Sticking to your budget is essential. You need to know where you spend your money to ensure short, intermediate, and long-term success. Sometimes we think we can rely on our mental math to account for our income and expenses. Unfortunately, this strategy doesn't yield long-term success. Our dashboard has additional resources for budgeting, and our Financial Guides can help you develop a personalized plan.

2. Cut back on unnecessary expenses.

We all spend money on things we shouldn't. Cutting back on unnecessary expenses can significantly

help when we feel it's hard to grow our savings continuously. When you budget, you will identify all the categories you spend money in. Make sure to include not only fixed expenses but those expenses that change and any debt you need to pay off. Once you have the list of your expenses, look at your non-essential expenses, aka your frivolous spending, and add that amount to your savings instead. Cutting back on unnecessary expenses is one of the easier ways to start building your savings. It can feel like a momentary bummer to cut back on extra spending, but it's the key to long-term financial health and peace.

3. Pay yourself first.

This is probably the most important tip I can give you when building your savings. You need to make yourself your #1 priority and invest in yourself. That means putting aside a portion of your income and diverting funds to savings so they can grow and be used by your future self! When your employer pays you, money should flow into your savings first. This will decrease the amount you spend, and over time that money will accumulate, helping you prevent financial disaster. Finally, you can spend whatever you want with the leftover money that wasn't added to your savings. The only way to spend money freely and be financially independent is to pay yourself first. This will help you prioritize saving first even when it does feel impossible. Our Financial Guides are here to help navigate you through budgeting and prioritize your savings, so you don't feel alone.



Excellence in Ministry: What Lies Ahead



by Rev. Julie Richardson VP for Development jrichardson@pensionfund.org

"I used to think I was the only pastor who felt stress about money. Now I know I am not alone, and there are people I can talk to." – EIM participant

THESE WORDS FROM A PARTICIPANT in our Excellence in Ministry (EIM) program speak to the heart of the overall well-being EIM encourages by first addressing issues surrounding finances for pastors and their families.

Begun in 2016, EIM is part of Lilly Endowment, Inc.'s National Initiative to Address Economic Challenges Facing Pastoral Leaders. In that sense, EIM is part of the wider church's efforts to address clergy finance issues. Since its inception, Pension Fund has served six cohorts

of pastors in their first five years of ministry through the EIM program. The EIM program has equipped them to:

- Discover they are not alone in their search for financial security. Many pastors suffer silent shame about the amount of debt they carry and their inability to handle financial emergencies. EIM is helping lift the veil of silence for pastors and helping build their confidence.
- Gain critical tools to bring financial freedom to their homes. Together with



their spouses (if applicable), EIM pastors have access to stellar personal financial education and coaching, helping them make informed decisions on their way to long-term financial wellness.

- Provide more informed financial leadership to their congregations. EIM pastors are finding their voice in matters of money and faith and are preaching more boldly about generosity, leading their churches to live more generous lives.

EIM participants anecdotally report significant debt reduction, increased savings, and better confidence in general regarding both household and congregational budgets. We are currently reviewing results from a survey of all EIM participants to obtain hard data on these things.

Until now, and through 2023, EIM is funded through a series of grants from Lilly Endowment, Inc. Those grants, combined with matching funds raised by Pension Fund staff, have amounted to \$2.5 million. As that funding and our partnership with Lilly ends, we feel poised to take what we've learned the last few years and expand EIM so that the benefits become available to a wider swath of clergy.

This March, Pension Fund hosted a summit of around 25 church leaders, some of whom are EIM graduates, to reflect on what we've learned and begin charting a forward course. What we know is that financial education and empowerment are only the first step – albeit a crucial one – when it comes to the overall health and well-being of our pastors, and we are grateful for the input of other leaders as we seek to build a broader, deeper, and more accessible program.

The question before us is not *if* EIM will continue, but how, and in what form.

Many years ago, when I was serving in congregational youth ministry, I was asked to serve on the finance committee of the church I was serving at the time. I found this puzzling, as such things had not been my forte in ministry. A wise church elder said to me, "I know that you



What we know is that financial education and empowerment are only the first step – albeit a crucial one – when it comes to the overall health and well-being of our pastors, and we are looking forward to the input of other leaders as we seek to build a broader, deeper, and more accessible program.

have thoughts on how we spend our money, Julie, and probably very good ones, and we need to hear them." Even if, at the time, I struggled to comprehend the church balance sheet, this elder trusted that I had enough theological education and spiritual depth to speak to matters of money. His belief in me changed how I thought about my wider role in the church, and I am grateful to this day. I believe his encouragement and his willingness to help me learn a few things as well made me a better, more confident pastor. And that meant I was a better, more confident version of myself overall.

Such moments are the building blocks of well-being and what we strive for as we seek to build upon what has already been, and what will be, with EIM.

I invite you to be in prayer for us as we look to the future and to consider a gift in support of EIM. I'd be happy to talk with you about what that might look like.

I'm so grateful for the brave, faithful pastors who have walked through the waters of EIM. And I look forward to what we'll all do together as we live into what's next.

Truce Lewellyn

There are many ways one might be called into ministry, but for Rev. Dr. Truce Lewellyn it was fried chicken. Every Sunday growing up, Truce's mother would invite their local minister over for a fried chicken dinner, and Truce was known to have said, "If I become a minister, I can have fried chicken every Sunday!" While Truce did not, in fact, eat fried chicken every Sunday night, he did serve 70 faithful years in the Christian Church (Disciples of Christ), and he left a legacy of influence in the many communities in which he lived and served.

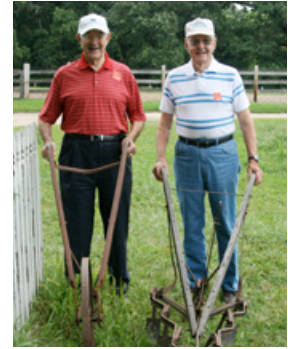
TRUCE CAME FROM HUMBLE BEGINNINGS on a tobacco farm in North Carolina, growing up with seven siblings, including his twin brother, Eorls. When Truce decided he wanted to go into ministry after he graduated high school in 1939, Eorls agreed to stay behind to help care for the farm. With this blessing, Truce headed off to Johnson Bible College (now Johnson University) with the only suitcase and \$70 the family had. There, he met and married his wife of nearly 60 years, Mary Nelle, in the summer of 1943.

His time at Johnson Bible College was just the beginning of a long and fruitful journey for Truce and Mary Nelle. Shortly after graduation, the couple soon moved to Enid, OK, where Truce obtained both a Master of Arts and a Master of Divinity from Phillips University Graduate Seminary. While attending seminary, Truce and Mary Nelle expanded their family with two children, Michael and Susan. The family followed Truce's path in ministry to churches in Hobart and Oklahoma City, OK; Albuquerque, NM; Casper, WY; and Kansas City, MO.

Truce was fortunate to have had immense support throughout his ministry, and in turn, he has provided that to others. When recalling his early career, his daughter Susan spoke of the support her father received from the beginning. She remembers when he was chosen to pastor University Place Christian Church in Oklahoma City that the hiring committee made a point to surround him with good advice, leadership coaching, and many other things to help him grow and develop as a pastor and a part of the local community. This commitment to his success at the start set the tone for the way he chose to minister to others.

In the midst of his ministry years, Truce received a Doctor of Ministry degree from Phillips University Graduate Seminary in 1979 after completing doctoral work in Pastoral Counseling. He used this training for the rest of his life, including teaching a "Marriage and Family" course at Casper College in Wyoming and providing marriage counseling and gentle care to others throughout his ministry.





Truce's servant leadership was felt at all of his congregations, but it was perhaps felt most within his own family. The Lewellyn family has lived a blessed life, but it wasn't without its challenges. In the early 60s, Truce's son, Michael, was admitted to a mental hospital. He struggled for many years with mental illness, and over time it was discovered that Michael was manic-depressive (now referred to as bipolar). This struggle affected the whole family, but Truce ensured that Michael got help.

Eventually, Michael was able to live a happy and productive life—marrying the love of his life, having children, and even finishing a master's degree—but that life was cut short in 1985 when he was hit by a car and killed at just 37 years old only a week before Christmas. This loss devastated the family, but during this very difficult time, Truce was able to care for his grieving family and celebrate his son's life well lived.

Truce's life experiences greatly impacted the ways he served his community. Throughout his life, Truce served on the boards of mental health organizations in honor of his son, as well as serving as the President of the Christian Churches of New Mexico and of the Central Rocky Mountain Area. He also ensured that he regularly contributed to programs that he felt made an impact, including the National Alliance for Mental Illness, Phillips Theological Seminary, and Pension Fund's very own Ministerial Relief and Assistance Program. Truce's ministry extended well beyond the church, and the community around him was all the better for it.

When Truce retired in 1986, he and his wife moved from Kansas City to Tucker, GA, so they could have a retirement where they could "golf, garden, and grandparent." But while Truce was no longer in "active" ministry, he remained a consistent presence in the church. While living in Tucker, Truce taught in a lay minister's program and organized a new congregation south of Snellville. When he moved into a retirement community near his daughter, Susan, he continued to minister by assisting with the chapel program there.

Rev. Dr. Truce Lewellyn passed away in early 2020 after a battle with vascular dementia. Even upon his death, Truce continued serving others through his generosity. His estate gifted Pension Fund \$159,000 to establish The Rev. Dr. Truce Lewellyn Endowment for Ministerial Relief & Assistance. This estate gift will generate approximately \$5,000 per year of continued support for multiple programs thorough MRA. Truce was able to grant this gift to Pension Fund as a member of The Chase Society.

Pension Fund's Chase Society was established as a way to honor our history and those who continue the spirit of generosity on which our organization was founded. From Ira Chase, who pastored his church with care and compassion, to Wabash Christian Church, who cared for his widow and children and ensured their legacy lived on through ministerial assistance, Pension Fund is rich in history of pastors like Truce Lewellyn.



EMPLOYER SPOTLIGHT

Casa de Adoración (CdA) (Phoenix, AZ)

The call to ministry isn't always an easy one. Pastoral leadership is more than just a job; it requires dedication and commitment to God and to others. Pastors Arturo and Janett Laguna felt the call to ministry from a very young age, but it wasn't until about 13 years ago that they felt the call to truly search for a way they could best serve God and have a true encounter with him daily.

ARTURO AND JANETT BEGAN their journey in ministry as Associate Pastors at Alpha and Omega (Disciples of Christ) in Phoenix, AZ. They served there for 10 years with a focus on the process of worship in the church. With that focus in mind, they knew the time was right to open a new church that made worship a lifestyle, and so Casa de Adoración (CdA) was established.

Casa de Adoración has been in worship for four years, and the pastors are striving to be

the best stewards of the church and of God's people. When speaking about the church and its formation, the pastors said, "We seek first a Christ-centered discipleship based on the Biblical teachings of Christ. We are believers who believe that worship is not only a part of church services but also a way of life in everything we do."

New churches can see many struggles in their early years and require a lot of support. Being a part of the greater Disciples movement has allowed a new church like Casa de Adoración





(CdA) to be better connected to resources they might not otherwise have known about. Rev. Dr. Jay R. Hartley is the Regional Minister and President of the Christian Church (Disciples of Christ) in Arizona. He grew up as a child of a Disciples pastor, and his history in the church has served him well in his role. When discussing the challenges for new churches, Hartley pointed out that some services to pastors may be common knowledge for lifelong Disciples, but it's less common among newer Hispanic congregations in his region—and he's looking to change that. His knowledge of programs for new pastors, such as Pension Fund's Gift Pensions for New Church Planters program, has enabled him to be of great support to pastors like Arturo and Janett.

"Starting a new church has many demands, and planning for the eventual retirement of their pastors would not have been a priority had Pension Fund not reached out with the Gift Pensions for New Church Planters program, assisting the congregation [of Casa de Adoración (CdA)] in establishing a practice of caring for the long-term financial needs of their pastors," said Hartley. After being in ministry for a long time and being a Pension Fund member for almost as long, Hartley understands how important it is to set pastors up for success. "A strong foundation at the beginning makes it much more likely that a congregation will experience long-term health, the pastors will be provided for in retirement, and the congregation will grow into deeper

covenantal relationships with the wonderful Disciples family," he said.

Pension Fund's Gift Pensions for New Church Planters program was established in 2019 to partner with new congregations by assisting new church ministers with Pension Plan membership. The program seeks to set, or continue, these pastors on a smart, secure road to retirement as they navigate the many challenges of a growing new church.

Because of the support Casa de Adoración received as a new church, they are beginning to thrive in their first four years. By being free of the financial stress of planning for retirement in the beginning, the Lagunas can focus on what matters most – the church. Recently, CdA was able to run its first Family Spiritual Retreat for members of their congregation. "It was a challenge," the Lagunas said, "but it was a great achievement to do this with the whole congregational family for the first time."

Church planting isn't for everyone, but for the Lagunas, there was a strong call to do just that. Casa de Adoración is seeking to "be able to serve every person who desires to have a personal relationship with Christ and anyone who needs to know Christ in whatever their personal condition might be." With the help of the Gift Pensions for New Church Planters program, they can focus on that without worrying about their future.

Casa de Adoración (CdA) (Phoenix, AZ)

El llamado al ministerio no siempre es fácil. El liderazgo pastoral es más que un trabajo, requiere dedicación y compromiso con Dios y con los demás. Los pastores Arturo y Janett Laguna sintieron el llamado al ministerio desde una edad muy temprana, pero no fue hasta hace unos 13 años que sintieron el llamado a buscar verdaderamente la manera en que pudieran servir mejor a Dios y tener un verdadero encuentro con él a diario.

ARTURO Y JANETT COMENZARON su camino en el ministerio como pastores asociados en Alpha y Omega (Discípulos de Cristo) en Phoenix, AZ. Sirvieron allí durante 10 años con un enfoque en el proceso de la adoración en la iglesia. Con ese enfoque en mente, sabían que era el momento adecuado para abrir una nueva iglesia que hiciera la adoración un estilo de vida, y así se estableció Casa de Adoración (CdA).

Casa de Adoración ha estado en servicio durante cuatro años, y los pastores se esfuerzan por

ser los mejores mayordomos de la iglesia y de servir al pueblo de Dios. Al hablar de la iglesia y su formación, los pastores dijeron: "Buscamos primero un discipulado Cristocentrico basado en las enseñanzas bíblicas de Cristo. Somos creyentes que creemos que la adoración no es solo una parte de los servicios de la iglesia, sino también una forma de vida en todo lo que hacemos".

Las iglesias nuevas pueden experimentar muchos desafíos en sus primeros años y requieren mucho apoyo. Ser parte del movimiento Discípulos ha





permitido que una nueva iglesia como Casa de Adoración (CdA) esté mejor conectada con recursos que de otro modo no habrían conocido. El Rev. Dr. Jay R. Hartley es Ministro Regional y Presidente de la Iglesia Cristiana (Discípulos de Cristo) en Arizona. Creció como hijo de un pastor de Discípulos, y su historia en la iglesia le ha servido bien en su rol. Al discutir los desafíos para las nuevas iglesias, Hartley señaló que algunos servicios a los pastores pueden ser de conocimiento común para los Discípulos de toda la vida, pero es menos común entre las congregaciones hispanas más nuevas en su región, y él está buscando cambiar eso. Su conocimiento de los programas para nuevos pastores, como el Programa de Pensiones de Regalo para Iglesias Nuevas de Pension Fund, le ha permitido ser de gran apoyo para pastores como Arturo y Janett.

"Comenzar una nueva iglesia tiene muchas demandas y la planificación para el eventual retiro de sus pastores no hubiera sido una prioridad si Pension Fund no se hubiera acercado con el Programa de Pensiones de Regalo para Nuevas Iglesias, ayudando a la congregación [de Casa de Adoración (CdA)] en estableciendo una práctica de cuidar las necesidades financieras a largo plazo de sus pastores", dijo Hartley. Después de estar en el ministerio durante mucho tiempo y ser miembro de Pension Fund durante casi el mismo tiempo, Hartley entiende lo importante que es preparar a los pastores para el éxito. "Una base sólida al principio hace que sea mucho más probable que una congregación experimente una salud a largo plazo, que los pastores se jubilen

y que la congregación crezca en relaciones de pacto más profundas con la maravillosa familia Discípulos", dijo.

El Programa de Pensiones de Regalo para Nuevas Iglesias de Pension Fund se estableció en 2019 para asociarse con nuevas congregaciones al ayudar a los nuevos ministros de la iglesia con la membresía del Plan de Pensiones. El programa busca colocar, o continuar, a estos pastores en un camino sabio y seguro hacia la jubilación mientras navegan por los muchos desafíos de una nueva iglesia en crecimiento.

Debido al apoyo que recibió Casa de Adoración como iglesia nueva, están comenzando a desarrollarse bien en sus primeros cuatro años. Al estar libres del estrés financiero de la planificación para la jubilación al principio, los Laguna pueden concentrarse en lo que más importa - la iglesia. Recientemente, CdA pudo realizar su primer Retiro Espiritual Familiar para miembros de su congregación. "Fue un desafío", dijeron los Laguna, "pero fue un gran logro hacer esto con toda la familia congregacional por primera vez".

La plantación de iglesias no es para todos, pero para los Laguna hubo un fuerte llamado a hacer precisamente eso. Casa de Adoración busca "poder servir a toda persona que desee tener una relación personal con Cristo y a todo aquel que necesite conocer a Cristo en cualquiera que sea su condición personal", y con la ayuda del Programa de Pensiones de Regalo para Nuevas Iglesias, pueden concentrarse en eso sin preocuparse por su futuro.



CLIENT RELATIONS UPDATE

Retirement Readiness: The Key Role Employers Play in Preparing Employees for a Successful Retirement



by Alexis Gammon VP of Client Relations agammon@pensionfund.org

In 2023, Pension Fund is focused on how we help make retirement possible for our members. According to Forbes, “a significant portion of the population will lack the resources to live comfortably after they stop working.”

WHEN THE AGE OF RETIREMENT blossomed, it was with the assumption that individuals would retire around age 65, supported by the minimum provisions of Social Security. The problem is, maintaining any type of comparable lifestyle in retirement is now rarely supported by Social Security alone! The Census Bureau forecasts that by 2030, more than 73 million people will be aged 65 and over, comprising about 21% of the country's total population. That's up from 49 million in 2016! Our country is facing a retirement crisis as access to pension plans decreases, inflation rises, and individuals prioritize current lifestyle over future security.

To support a comfortable retirement, both employees and employers must plan ahead.

What the average person needs financially to retire depends largely on what they earn while working. On average, people require about 75% of their pre-retirement income to ensure a comfortable old age¹. Employers hold an increasingly crucial role in helping employees plan for the day they stop working, by necessity or by choice. Employers must offer and promote retirement products to urge employees to properly prepare for a life after full-time work. Choosing to save for the future is not a one-time election when an employee is hired. Employee needs, priorities, and the means to save change over time. Employers who educate on benefits year-round help their employees remain mindful of their long-term goals. Lack of information, knowledge, and motivation are often at the heart of why people neglect to save².

Employers can provide access to retirement savings options through payroll, simplifying the process for the employee and committing them to ongoing contributions. Employers can also offer peace of mind and financial security through Pension Fund retirement products that protect employees from the downsides of market risk. Secure pension





credit accumulation and base interest on the Tax-Deferred Retirement Account 403(b)/Roth 403(b) (TDRA 403(b)/Roth 403(b)) bolster employee confidence that their funds saved toward retirement will be there when they need them.

Traditional retirement products require that employees choose their own allocations, discouraging those who lack the knowledge to make such elections from even participating. By removing this barrier to entry using our secure Pension Plan and TDRA 403(b)/Roth 403(b), which require no asset allocation management by members, employers can increase participation and encourage individuals to engage in the process of retirement savings. Nurturing an employee's investment in their financial future can even assist with retention by encouraging longer tenure based on maintaining access to their trusted employer-sponsored retirement plans.

Another service that can help make retirement a reality, and one that our members often overlook, is free access to Your Money Line. While Pension Fund cannot give financial advice, we understand that our members sometimes need guidance to help them navigate their most difficult financial questions. This complimentary financial wellness program assists members with these questions and helps them focus on financial stability. The Your Money Line Financial Guides help provide solutions and a plan of action for members who feel they are struggling to tackle personal debt, prioritize savings, or make the best choices possible with their current income.

With employer support, secure product options, and access to free Financial Guides, Pension Fund can help make retirement possible.

Sources:

¹ https://www.washingtonpost.com/business/americas-retirement-crisis-is-a-financial-crisistoo/2022/03/28/201bcb06-ae97-11ec-9dbd-0d4609d44c1c_story.html

² CBS April 22: <https://www.cbsnews.com/news/secure-2-0-retirement-changes/>

CNBC Dec. 22: <https://www.cnbc.com/2022/12/02/why-more-workers-need-access-to-retirement-savings.html>

Streamlining Your Online Pension Fund Member Experience



by Melissa Plew Senior Project Manager mplew@pensionfund.org

Our goal is to continue to enhance the member experience and provide value inside the Member Portal. We have been hard at work designing and developing new functionality that will streamline processes for you as members and for our internal staff. Here are some of the new features and changes coming your way in 2023:

Online Transactions Through Fifth Third

At the beginning of 2023, we rolled out a new one-time deposit experience for members that allows you to make deposits directly with Fifth Third, our bank of record. This not only greatly reduces the turnaround time of deposits—getting money into your account in as little as 24 hours—but it also eliminates a significant amount of work for our internal staff. This streamlined process means more time can be spent tending to other member needs, all while your Member

Portal-initiated deposits are making it to your Pension Fund accounts sooner, where they can start gaining valuable interest more quickly than deposits submitted via paper forms. We plan to roll out this same functionality for recurring deposits later this year, which will allow you to set up a recurring deposit as late as the day before you want it to begin and have visibility into your current recurring deposit amounts and dates across all your eligible accounts to simplify management of those deposits.

The screenshot displays the Member Portal interface. On the left, there is a 'Personal Information Update' section with a dropdown menu for 'Which Personal Information would you like to update?' and a 'Next' button. On the right, there is a table titled 'My Tax Documents' with columns for 'Year', 'Tax Form Name', and 'Last Modified Date'. The table contains two rows of data for the years 2022 and 2021, both showing 'C1099I' as the tax form name.

Year	Tax Form Name	Last Modified Date
2022	C1099I	Jan 6, 2023
2021	C1099I	Jan 7, 2022



New Updated Home Page (PICTURED ABOVE)

As we update the Member Portal, we want to make sure you can see these new features. We plan to redesign the homepage of the Member Portal to provide quick action links to some of the most useful features of the Portal. Here we will promote new functionality as it is released to be sure you are always informed of these features and are getting the most out of your Member Portal experience.

Document Center (PICTURED LEFT)

Be on the lookout for the rollout of two exciting new enhancements. First, you will have access to a "My Documents & Secure Uploads" section. This new document center will allow you to view a history and have additional copies of important Pension Fund mailings such as Quarterly Statements and RMD letters. More importantly, it will now give members a safe and secure way to seamlessly submit forms and other documentation to Pension Fund without emailing sensitive information. Second, a "My Tax Documents" section will display current and past tax documents so you can have them handy during tax filing season. Making these documents available to members in the Portal will pave the way for us to allow you to opt out of receiving

paper documents if you so choose, getting these important documents to you more quickly and helping reduce our carbon footprint while also being a better steward of our expenses by saving on print and postage.

Self-Service Beneficiary Management

It's important to plan ahead and make sure that Pension Fund has the most up-to-date information on file for your beneficiaries. Later in 2023, we will look to provide self-service beneficiary management in the Member Portal to make it easier for you to securely add or update this important data point as you experience life changes.

We hope that the Member Portal will continue to add value for you as a member of Pension Fund and make it possible for you to manage more of your member experience with ease while maintaining your security.

Need access to the Member Portal to start benefiting from these new features?

**Contact Member Relations today to get your Member Portal account activated!
Call 866.495.7322.**



GET TO KNOW PENSION FUND

Staff Changes and Updates



by Alexis Gammon VP of Client Relations agammon@pensionfund.org

As Pension Fund grows, we've made some important changes to serve our current and future members. Take a look at what's new on our team.



Rev. Jonathan Beckham-Brink

is our newest **Area Director** who will serve the Pacific Southwest, Arizona, Northern California/Nevada, Oregon/Southwest Idaho, Central Rocky Mountain, and Northern Lights regions.

Jonathan grew up at First Christian Church (Disciples of Christ) of Pasadena, TX and explored ministry in his early years by joining the Youth Ministry Council. His call to ministry was first felt on campgrounds and followed him into his college experience. His early career experience included time as a paid church musician and an Admissions Counselor before serving in ministerial roles for five different churches. We are thrilled to welcome him to the team and look forward to our members and employers getting to know him this year.



Dee Long has moved into the role of **Director of Church Relations**. Dee serves Pension Fund by promoting, supporting and managing the application process for Ministerial Relief and Assistance (MRA). Dee works with our Program and Development staff to ensure eligible members receive critical support in their time of need. Additionally, Dee's strong relationship with the National Convocation and the Church of Christ/Disciples of Christ International helps ensure connection and awareness of Pension Fund retirement programs and services.



Rev. Gabriel Lopez

has been named the **Director of Diversity, Equity, Belonging and Accessibility (DEBA)**.

In this new role, Gabe is co-leading our organization-wide strategic initiative to improve access to our products and services across diverse cultures and communities and co-chairing our Pro-Reconciliation/Anti-Racism staff team.

The DEBA initiative launched a market survey in late February conducted by P3 Development. P3 is a market research firm based in Milwaukee, WI that assists historic institutions in understanding how they can better serve historically underserved communities and constituencies.

These three Area Directors have been promoted to **Associate Vice President for Client Relations**. They will continue to serve their territories with new internal administrative responsibilities.



Raquel Collazo



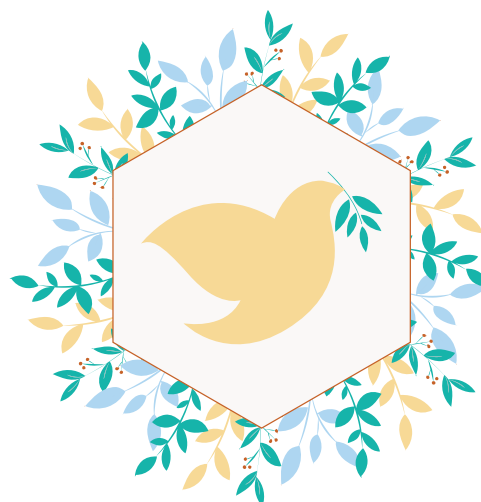
Rev. Thomas McCracken



Rev. Sarah Renfro

In Memoriam

Following are member deaths that were reported to Pension Fund between June 21 and December 31, 2022.



Robert Harrison
Alexander
Desert Hot Springs, CA

Mark Stephen Allen
Blacksburg, VA

Stephen C. Allen
Indianapolis, IN

Barbara A. Almon
Plainview, TX

Elizabeth Anderson
Eugene, OR

Maurice E. Ankrom
Asheville, NC

Donald W. Arterburn
Kokomo, IN

Margie A. Avery
Pearland, TX

Edith H. Barley
Lynchburg, VA

Jean Irving Barnes
Champaign, IL

Mary A. Basalla
Pleasant City, OH

Betty C. Bell
Clarksville, TN

Russ Riley Bellora
Coffeyville, KS

Catherine Berge
Chapel Hill, NC

Miriam P. Birdwhistell
Atlanta, GA

John Lloyd Black Jr.
Winchester, VA

Lola L. Blankenship
Versailles, KY

Angel C. Bonilla
Bronx, NY

William E. Bowles
Arkansas City, KS

Doris M. Brokaw
Shoreline, WA

Frances V. Brown
Columbia, MO

Joseph Lee Bryan
Memphis, TN

Kathy Lee Bryant
Anthem, AZ

Charles Edward
Byron
Stewart, OH

David Arthur Caldwell
Catonsville, MD

Carol S. Callaway
Hobart, IN

Sue W. Cardwell
Indianapolis, IN

Evalyn A. Carlson
Grand Marais, MN

James F. Caton
Granbury, TX

Myonghi S. Choi
Bartlett, IL

Margaret J. Clanton
Tyler, TX

Leon Clark
Longview, TX

Thelma J. Cloud
Blanchard, OK

Lois S. Coleman
Littleton, CO

Carol S. Cook
Lyons, OH

Judith L. Copley
Batavia, OH

Carol Q. Cosby
Indianapolis, IN

Kenneth W. Coy
Columbus, OH

Dauna D. Davis
Oklahoma City, OK

Dorothy A. Davis
Estes Park, CO

Kenneth G. Dean
Seminole, FL

James Dickinson
Weddington, NC

Merita E. Diebel
Fort Worth, TX

R. Niles Dodson
Uniontown, PA

David C. Downing
Desert Hot Springs, CA

Mary Hamilton Eaton
Knoxville, TN

George L. Edwards
Pelham, AL

Carol L. Ehlmann
Fort Worth, TX

Luz Marie Elizarraras
South Gate, CA

Janet Farrior
New Philadelphia, OH

Frances K. Fortson
Enid, OK

Lily G. Foster
Vail, AZ

Jesse James Fountain
Montgomery, AL

Ernest L. Freeman
Mill City, OR

Katherine V. Games
Campbellsville, KY

John William Gardner
Newton, IA

Raymond T. Gardner
Cincinnati, OH

Frances H. Gay
Dunedin, FL

Betty J. Gimmer
Colonial Beach, VA

David Earnest
Godsey
Unicoi, TN

Phyllis J. Goins
Johnson City, TN

Donald M. Good
Colorado Springs, CO

John R. Gould
Olathe, KS

Douglas A. Graham
Matthews, NC

Claudia E. Grant
Indianapolis, IN

Cranford D. Graves
Nash, TX

John P. Hall
Lakewood, CO

Margaret E. Haltom
Las Cruces, NM

Francis Nealy
Hamilton Jr.
Rialto, CA

Nancy S. Hanby
Benton Harbor, MI

Dorothee E. Hansen
Traverse City, MI

Beulah Rae
Hartenberger
Fredericktown, MO

Sandra F. Harvey
Indianapolis, IN

Gordon F. Higgins
Okotoks, AB

Betty Hood
Port Orange, FL

Kerry P. Hookstra
Sayre, OK

Mary Margaret
House
Kansas City, MO

H. G. Houston
Nevada, IA

Stacy Emerson
Hughes
Boise, ID

» Samuel Edward Johnson III <i>Summerfield, FL</i>	Richard K. Mahoney <i>Noblesville, IN</i>	Lonnie F. Oates <i>Cambria Heights, NY</i>	Marvin O. Scherpf <i>Kennewick, WA</i>	Zella M. Thomas <i>Greencastle, IN</i>
Joe Milton Jones <i>Marion, IA</i>	Woon Mak <i>San Francisco, CA</i>	Alison M. O'Grady <i>Birkenhead, AK</i>	James D. Schimmel <i>Warren, OH</i>	Diane D. Thompson <i>Florence, OR</i>
Joe R. Jones <i>Oklahoma City, OK</i>	Laura E. Maldonado <i>Dorado, PR</i>	Sandra E. Owen <i>Austin, TX</i>	Olive B. Schimmel <i>Warren, OH</i>	Doris Jean Thompson <i>Portsmouth, VA</i>
George Curtis Jones Jr. <i>Lexington, KY</i>	Charles Lloyd Martin <i>Florence, KY</i>	James Palmer <i>Winterville, NC</i>	James D. Scholer <i>Champaign, IL</i>	LaDonna Gail Truitt <i>Fort Worth, TX</i>
William E. Keller <i>Bella Vista, AR</i>	Mary Lou Martin <i>Clemmons, NC</i>	Rosella J. Patenaude <i>Hillsboro, KS</i>	Caroline Anne Shifflet <i>Chico, CA</i>	William Edward Tucker <i>Fort Worth, TX</i>
Richard V. Kilgore <i>Indianapolis, IN</i>	Carol Fisher Mathieson <i>Canton, MO</i>	Albert Mitchell Pennybacker <i>Chagrin Falls, OH</i>	Robert L. Simpson <i>Enid, OK</i>	Robert D. Vinson <i>Fullerton, CA</i>
Elizabeth Kathleen Kimmel <i>Bloomington, IN</i>	Margaret Kay Mayfield <i>Hampton, TN</i>	Catherine T. Phillips <i>Shell Knob, MO</i>	Ann Yvonne H. Slifer <i>Warrensburg, MO</i>	John Mark Wade <i>Watauga, TN</i>
Bonnie Kirkman <i>Bonita Springs, FL</i>	Peggy Marie Mayfield <i>Colleyville, TX</i>	David Stevenson Plumbley <i>Independence, MO</i>	Ozzie B. Smith <i>Fort Lauderdale, FL</i>	M. Suzainne Wallace <i>Tulsa, OK</i>
Grace L. Knowles <i>Elizabethton, TN</i>	William Thomas McConnell III <i>Okeana, OH</i>	Vesta K. Porter <i>Macon, GA</i>	Reva N. Smith <i>Franklin, IN</i>	Robert E. Wallace <i>Newbern, VA</i>
Carol M. Kolsti <i>Trophy Club, TX</i>	Mary A. McKercher <i>Clarksville, IN</i>	Hugh H. Pratt <i>Buffalo, NY</i>	Timothy Raymond Smith <i>Trenton, MO</i>	Gary R. Weatherly <i>Rocklin, CA</i>
Beverly Anne Kottmyer <i>Hebron, KY</i>	Gerald Vincent McNabb <i>Riverdale, MD</i>	Cherie J. Prox <i>Niles, OH</i>	Richard L. Speck <i>Chautauqua, NY</i>	Shirley J. Whitton <i>Hopkins, MN</i>
Alec John Langford <i>Indianapolis, IN</i>	Leliah McNaney <i>Livonia, NY</i>	Madeline M. Perez Quiros <i>El Paso, TX</i>	Frances L. Steinmetz <i>Marietta, GA</i>	Emily Jane Winslow <i>Hesston, KS</i>
John J. Lau <i>Phoenix, AZ</i>	Leondus Melvin <i>Clinton, NC</i>	Marian E. Ratzlaff <i>Turner, OR</i>	Keith D. Stephenson <i>Estes Park, CO</i>	Lynda B. Woodard <i>Lexington, KY</i>
Phillip Alan Lee <i>Salisbury, MD</i>	William Duane Miller <i>Hopkinsville, KY</i>	Zella B. Reagin <i>Enid, OK</i>	Carole Lynn Stevens <i>Holladay, UT</i>	Penny York <i>Salem, OR</i>
Ruth Elaine Lee <i>Ferryville, WI</i>	Eloisa Branuelas Morales <i>Bayamon, PR</i>	Wayne Richardson <i>El Paso, AR</i>	Beatrice Ada Still <i>Surrey, BC</i>	Edwin H. Zackrisson <i>Corona, CA</i>
Ila Mae Lines <i>Springfield, MO</i>	Paul W. Murphey <i>Dothan, AL</i>	Norma J. Roberts <i>Bloomington, IL</i>	Dale A. Stitt <i>Portland, OR</i>	Julian Ibarra Zapata <i>El Paso, TX</i>
Thomas L. Loftus <i>Longmont, CO</i>	Katherine Alma Murray <i>Sundre, AB</i>	Freeman J. Robinson <i>Orlando, KY</i>	James C. Suggs <i>Cedar Park, TX</i>	Carl Edward Zerweck III <i>Detroit, MI</i>
Priscilla A. Long <i>Richardson, TX</i>	John W. Nebgen <i>Mesa, AZ</i>	Mildred O. Rodgers <i>Gresham, OR</i>	Dianne H. Sweckard <i>Winder, GA</i>	
Harlon L. Looper <i>Benbrook, TX</i>	William I. Ney <i>Gulfport, FL</i>	Duwayne Rottier <i>Antioch, CA</i>	Roger TannerThies <i>Jefferson City, MO</i>	
Katherine H. Love <i>Columbia, MO</i>	Sherina P. Niles <i>Saint Louis, MO</i>	Dorothy N. Sallee <i>Bloomington, IL</i>	Janice K. Tatlock <i>Granbury, TX</i>	
Joe Allen Lowe <i>Corp Christi, TX</i>		Daniel A. Sanford <i>Vero Beach, FL</i>	Ida M. Tegeder <i>Jacksonville, IL</i>	

Remembering the Gifts

Pension Fund gratefully acknowledges our donors who faithfully believe in the ministry of those who serve the church.

Thank you to all of the individuals and organizations who made contributions between July 1 and December 31, 2022, to Ministerial Relief and Assistance, Churchwide Health Care Gift Fund, Heartbeats of Faith, 13th Check and the Endowment. You make our work—and the support of ministry—possible with your faith, trust and support of Pension Fund. **Again, thank you!**



Ministerial Relief & Assistance

Gifts from individuals for Ministerial Relief & Assistance help make life better for many of our older and retired ministers, missionaries and their widows or widowers. Gifts to MRA, along with earnings from the Endowment Fund, make funds available for the Supplemental Gift (to supplement low pensions) and Ministerial Relief (for those with no pensions).

INDIVIDUALS

Amos and Marilyn Acree	Enid Olivieri-Ramos and Ceferino Aponte	Nicanor and Elsa Bandujo	Lawrence and Carol Bobbitt	Richard Brooks
Cathy Adams	Jose and Eva Araya	Vernon T. Banks	Trent and Norma Bobbitt	Eric Brotheridge
Todd Adams	Janet Nelson-Arazi and Salomon Arazi	Clifford Barber	Robert and Peggy Bock	Sarah Renfro and Kyle Brown
Ron Adicott	Carol Armstrong	Barbara Bare	Ben Bohren	Margaret Brown
Kathryn Albers	Anne Atkins	Karen Barr	Alice and John Bolen	Dorothy Brown
David Alexander	Jack Austin	Frances Barton	Alan and Joan Bone	Roy Bullock
Anna Alexander	Stephen Austin	Lawrence and Jennifer Bass	Jerry and Sheri Book	Jimmie Beaumont and Rebecca Bunton
Don and Judy Alexander	Sydney Avent	Kelly and Jennifer Bauer	Eugene and Karen Boring	David and Vickie Burch
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Gerald Harper and Elizabeth Allen	Charles and Burnell Babcock	Doris and George Beckerman	Carl and Nelda Bowles	Carol Burkhalter
Thaddaeus and Jennifer Allen	Barbara Bable	Betty Beeson	Janet Brackett	James and Hilda Bussell
Neil and Nora Allen	Mary Backstrom	Agnes Bell	Robert and Ruth Bradley	Timothy Butler
Patricia Allred	Elizabeth and Tom Knowles-Bagwell	Charles and Martha Beneze	Anna Bradley	Charlene and Keith Butz
John and Marsha Von Almen	James and Beverly Bailiff	John Bennett	Geoffrey Brewster	Gregoria Cabrera
Susan Anderson	Fay Bailiff	Judy Bever	Donald and Barbara Brezavar	Janet Carlson
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Margaret Anderson	David Baker and Priscilla Adamson Baker	William and Margaret Bingham	Nancy Brink	James Carpenter
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At Christmastime each year, we lift the financial burden of pensioners living check to check by providing recipients with a "13th Check." This extra boost in income is a highly anticipated and appreciated gift for those who served the church at the cost of their own financial success. The following is a list of individuals and congregations that responded to the 13th Check offering. These gifts will provide future 13th Checks to qualified recipients. We express our sincere appreciation.

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The Health Care Gift Fund helps pay the Health Care Medicare Basic premium for many worthy servants of the church.

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Endowment

Earnings from the Endowment Fund assist those whose pensions are low or who have no pensions or assist with the payment of health care premiums and other needs. The Endowment Fund includes gifts, bequests and memorials to loved ones and honored ministers, as well as other estate gifts.

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The following is a list of individuals who have made gifts and commitments to the Heartbeats of Faith Capital Campaign.

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Nancy Saenz
Andrea Toonder

Client Relations Area Director



Alexis Gammon
VP OF CLIENT RELATIONS

REGION: Canada
agammon@pensionfund.org
770.842.1475



Rev. Sarah Renfro
ASSOCIATE VP OF CLIENT RELATIONS

REGIONS: Kentucky, Illinois/Wisconsin, Mid-America, Michigan, Upper Midwest
srenfro@pensionfund.org
317.496.5735



Rev. Jonathan Beckham-Brink
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REGIONS: Pacific Southwest, Arizona, Northern California/Nevada, Oregon/Southwest Idaho, Central Rocky Mountain, Northern Lights
jbeckham-brink@pensionfund.org
463.276.3529



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AREA DIRECTOR

REGIONS: Greater Kansas City, Kansas, Nebraska, West Virginia, Virginia, South Carolina, Georgia, AL/NWFLA
asmith@pensionfund.org
317.601.8865



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ASSOCIATE VP OF CLIENT RELATIONS

REGIONS: Oklahoma, Southwest
tmccracken@pensionfund.org
214.862.5612



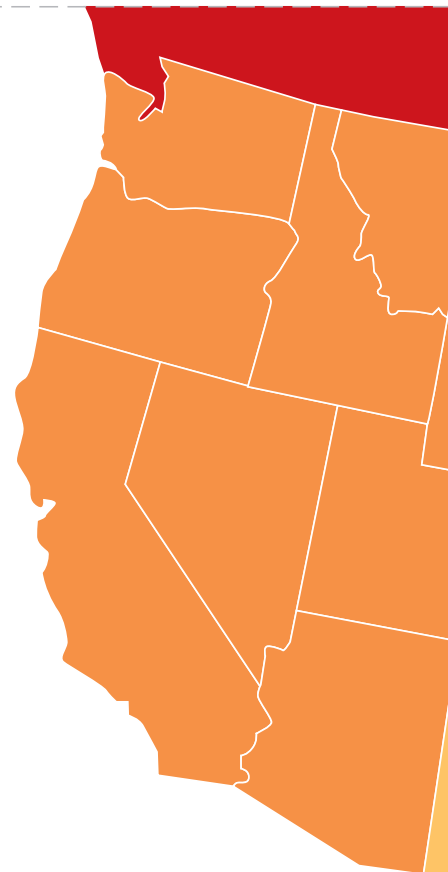
Matt Shears
AREA DIRECTOR

REGIONS: Florida, Great River, Tennessee, North Carolina, the Capital Area
mshears@pensionfund.org
865.770.0067



Raquel Collazo
ASSOCIATE VP OF CLIENT RELATIONS

REGIONS: Indiana, Ohio, Pennsylvania, Northeast, Puerto Rico
Sirviendo a miembros de habla hispana en todas las regiones.
rcollazo@pensionfund.org
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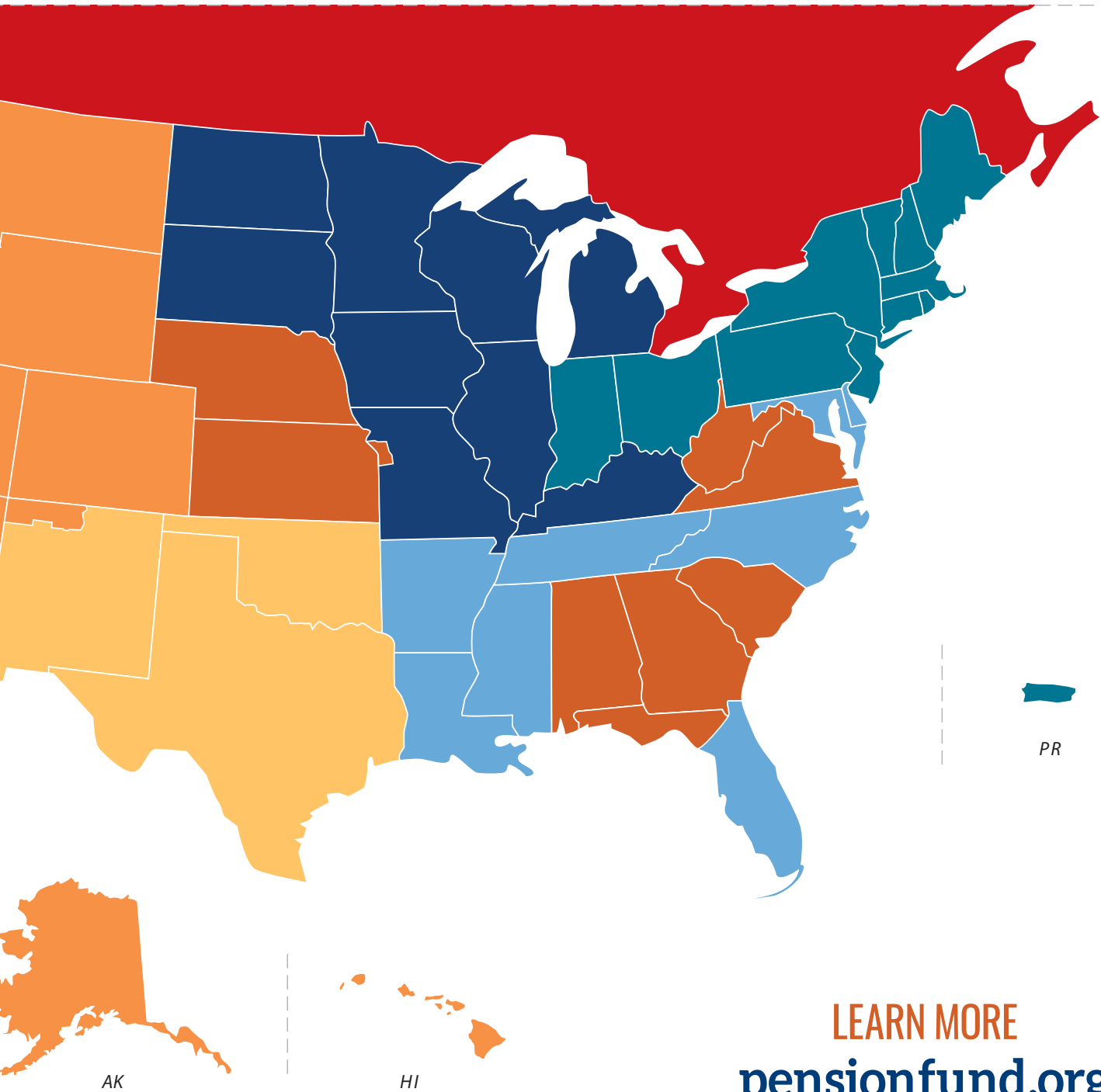


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Important Dates

April 12–15

Spring board meeting

April 18

Last day to contribute to your IRA and count it towards 2022

May 2

Annual Member call at 11 a.m. and 7 p.m. (EST)

June

RMD Letters arrive with 2023 RMD amounts for accounts held at Pension Fund

July 29 – August 1

General Assembly

September 26–28

Spire Conference

Office Closure Reminders

April 7

Good Friday

May 29

Memorial Day

June 19

Juneteenth

July 4

Independence Day

September 4

Labor Day



Annual Member Conference Calls



MAY 2, 2023

Mark your calendar and join Pension Fund President and CEO, Rev. Dr. Todd Adams, as he leads the 2023 Member Conference Calls. Live question and answer sessions for participating members will follow Todd's formal presentations.

Dial in up to 15 minutes before the start time. There are two convenient times to join:

11:00 AM EDT

Dial **(888) 886-7786**
Conference ID: **75027685**

7:00 PM EDT

Dial **(888) 886-7786**
Conference ID: **14403875**