

## Terminating an Employee's Benefits upon Retirement

### Overview

This checklist provides an overview of the steps to terminate an employee's (clergy or lay) benefits offered through The Church Pension Fund (CPF) and its affiliates (referred to as "the Church Pension Group" or "CPG") upon retirement. For information on termination of benefits due to an employment termination or resignation, see "[Terminating an Employee's Benefits after the End of Employment](#)."

### Before you Begin

Complete the following steps:

<p>Instruct employee to contact CPG Retirement Planning Specialist.</p>	<ul style="list-style-type: none"> <li>• At least <u>three months</u> before the employee's expected retirement date, the employee should contact Client Services at (866) 802-6333, Monday - Friday, 8:30AM - 8:00PM ET to learn more about their benefits in retirement.</li> <li>• A CPG Retirement Specialist will provide information to the employee about Group Medicare Advantage Plans.</li> <li>• After the employee contacts CPG regarding plans for retirement, CPG assigns a Retirement Coordinator to guide the employee through the retirement process.</li> </ul>
<p>Gather a list of benefits information for retiring employees.</p>	<ul style="list-style-type: none"> <li>• Use the "Benefits Quick Guides" to assist in sharing information with the retiring employee: <ul style="list-style-type: none"> <li>○ <a href="#">Quick Guide to Clergy Benefits upon Retirement</a></li> <li>○ <a href="#">Quick Guide to Lay Employee Benefits upon Retirement</a></li> </ul> </li> </ul>
<p>Confirm retirement contribution payments.</p>	<ul style="list-style-type: none"> <li>• Check to verify payment of the following (as applicable): <ul style="list-style-type: none"> <li>○ All assessments to the Clergy Pension Plan (paid to CPF).</li> <li>○ All assessments to the Lay Employees' Retirement Plan (Lay DB Plan) for lay employees (paid to CPF).</li> <li>○ All contributions to the Retirement Savings Plan (RSVP) for clergy and lay employees (paid to Fidelity).</li> <li>○ All contributions to the Lay Employees Defined Contribution Retirement Plan (Lay DC Plan) for lay employees (paid to Fidelity).</li> </ul> </li> <li>• If payments have <u>not</u> been made, then complete payments as soon as possible. Contact CPG's Client Services at (855) 215-5990 if you need additional assistance.</li> </ul>
<p>Confirm you have access to My Admin Portal (MAP).</p>	<ul style="list-style-type: none"> <li>• Log into MAP at <a href="https://cpg.org/map">https://cpg.org/map</a></li> <li>• If you cannot access MAP, request access from your Institution Administrator or your institution's Diocese Administrator. If you do not know who that person is, call CPG's Client Services at (855) 215-5990.</li> </ul>
<p>Gather necessary information about the retiree.</p>	<ul style="list-style-type: none"> <li>• Current mailing address</li> <li>• Date of the last day of work</li> </ul>

## Terminate Employment and Benefits

Institution and Diocese Administrators can change the employee's employment status to retired.

After the termination of employment and benefits is submitted through MAP, nothing more needs to be done by a benefits administrator. The CPG Retirement Coordinator will complete the retirement process with the retiree.

<p>Change the retiree's employment status in MAP.</p>	<ul style="list-style-type: none"> <li>• Log into MAP at <a href="https://cpg.org/map">https://cpg.org/map</a></li> <li>• From the MAP main landing page, click on the "People" tab.</li> <li>• From the People landing page, click on the "Terminate Employee" quick action button.</li> <li>• If you are responsible for multiple institutions, select the employing institution from the "Select an institution" screen, and then select the employee from the "Employees" screen.</li> <li>• Click the "Remove" link to the right of the person's name to open the "Termination Information" screen.</li> <li>• On the "Termination Information" screen:             <ul style="list-style-type: none"> <li>○ Select the employment termination type of "Employment."</li> <li>○ Enter the date of the last day worked.</li> <li>○ Select "Yes" for "Is this person retiring?"</li> <li>○ Select the "Submit" button.</li> </ul> </li> <li>• Refer to the "Support and Guidance" links onscreen for assistance and additional information.</li> <li>• For additional instructions, refer to the eLearning interactive guide, <a href="#">Termination of Employment and Benefits</a>.</li> </ul>
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Note: For **pre-65 retirees**, post-retirement enrollment in healthcare benefits will be in the medical and/or dental plans adopted by the employer they are retiring from. The pre-65 retiree will continue to access healthcare benefits from that employer's plan options until they attain age 65 and/or become eligible for Medicare. You may be called upon by the pre-65 retiree for assistance with updates to healthcare benefits due to Significant Life Events or Annual Enrollment.

## Disclaimer

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