

Historical Service Record/Appointment/Compensation Change Form

Clergy Retirement Security Program (CRSP), Ministerial Pension Plan (MPP), Comprehensive Protection Plan (CPP), Pre-82 Plan

Part 1 – General Information. Please note: This form is used to report historical changes only. Current data should be entered in Benefits Access.

Participant name _____ Conference # _____ Current status _____
 Social Security # (last 5 digits) _____ Participant # _____

Part 2 – Changes(s) to Be Made. Complete entire line(s) below, even if the change is just in one area.

From Date	Through Date	Conference Status	Appointment Name and Number	Appointment Percentage	Total Cash Salary	Parsonage/Housing Allowance	Housing Exclusion	Pre-82 Pension Credit (Y/N)

- Conference Status**—use initials:
 Associate Member – AM Full-time Local Pastor – FTL Part-time Local Pastor – PTLP Probationary/Provisional Elder – PE
 Deacon in Full Connection – FD Full Member – FM Probationary Member – PM Student Local Pastor – SLP
 Elder in Full Connection – FE Member of Other Denomination – MOD Probationary/Provisional Deacon – PD
- Appointment Percentage**—If serving less than full-time, enter 25%, 50% or 75%.*
- Total Cash Salary**—Cash paid to the clergy person by the church/charge and/or conference. Total Cash Salary consists of base pay, cash bonuses, equitable compensation, cash allowances, cash for benefit programs, and before-tax, Roth and after-tax deferrals to the United Methodist Personal Investment Plan (UMPIP) and other 403(b) programs, section 125 medical reimbursement and designated housing allowance exclusion. Total Cash Salary does not include cash allowances provided in lieu of parsonage.
- Parsonage/Housing Allowance**—Parsonage is valued at 25% of Total Cash Salary. Housing allowance is cash provided in lieu of a parsonage. If applicable, indicate “P” for parsonage provided or enter the actual dollar amount of the housing allowance. *This amount should not be included in Total Cash Salary.*
- Housing Exclusion (Internal Revenue Code Section 107)**—Amount included in Total Cash Salary that has been designated by the charge conference for housing expenses and not subject to federal income taxation.

* For Part-time Local Pastors or Deacons serving less than 25% please indicate “less than 25%.”

Part 3 – Supporting Evidence

- Conference journal, year _____ page _____ Executive session action, *Disciplinary* paragraph(s) _____ Enrollment form*
- Conference board resolution (copy of minutes attached) Joint distributing committee action

** Required if never enrolled*

Part 4 – Reason for Omission

- Error of record Other _____
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Part 5 – Corrected Copy. Indicate the person(s) to whom Wespah Benefits and Investments should send a copy of the corrected Service Record.

- Participant Conference benefits officer
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Part 6 – Signature

Signature of authorized signer _____ Title _____ Date _____