COLLECT AND ORGANIZE FINANCIAL RESOURCES AND DOCUMENTS

Employer

• If ordained in the Episcopal Church, review a copy of your Church Pension Fund **Annual Certificate** (sent during the second quarter) and your Fund's **Personal Information Summary** (sent during the third quarter). If you have not received these or you note inaccuracies, please call Pension Services, *allowing two weeks before needed*, at (866) 802-6333, to get copies or answers to your questions. If not ordained in the Episcopal Church, contact your human resources department where you have been employed or where you are currently working to review your pension plan statements.

• If ordained in the Episcopal Church, **call your Diocesan Office** and (1) ask specifically what Diocesan or other **group life insurance** (if any) you receive beyond what the Church Pension Fund provides as a benefit, i.e., a maximum of $50,000 for active clergy, and (2) ask what your current **health coverage** is through the Diocese. If not ordained in the Episcopal Church, contact your human resources department where you have been employed or where you are currently working to review your benefits.

Government/Social Security

• You should receive your "Annual Statement" from Social Security three months before your birthday. If you have not received one in the last 12 months, get two **Social Security Request** envelopes (for you and, if applicable, a family member) by calling Social Security at (800) 772-1213. Please complete and mail to Social Security. When you receive your report from Social Security, review it for accuracy and contact Social Security if you have any corrections. You may also use Social Security Online at www.socialsecurity.gov ("Online Direct Services") to request your Statement calculation, which takes about four weeks to receive in the mail.

Individual

- **ASSETS** (Estimated Value): Personal property, autos, boats, children's assets, valuables (art, jewelry, collections)
- **INSURANCE:** Life, health, long term care, disability, auto, home, liability, other
- **INVESTMENTS AND SAVINGS:** Bank accounts, brokerage statements, tax-sheltered annuities/403(b) Plan, stocks, bonds, mutual funds
- **LEGAL DOCUMENTS:** Will, trust agreement, durable power of attorney, health P.O.A., living will
- **LOAN AND LIABILITY:** Mortgages, auto, personal loans, business, other debt
- **OTHER DOCUMENTS/DATA YOU DEEM IMPORTANT:** Tax returns, business, other