

Collect and Organize Financial Resources and Documents

Employer

- **If ordained in The Episcopal Church**, review a copy of your Church Pension Fund's **Annual Certificate** (generally sent during the first 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 the Church Pension Group, *allowing two weeks before needed*, at (866) 802-6333, to get copies or answer 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, 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

- To review your Social Security earnings record and estimate your retirement benefits online, log on at: **www.socialsecurity.gov/mystatement**. If you have not already done so, you must first create a "my Social Security Account." You will be asked to provide some personal information about yourself and give answers to some questions that only you are likely to know. After a secure login, select "Earnings Record" and "Estimated Benefits" to review your information. You may want to print a copy of these reports for your records.

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