

2020 MINISTERIAL ASSISTANCE GRANTS



Caring For The Retirees Of The United Church Of Christ

FINANCIAL ASSISTANCE WITH DIGNITY

Since 1885, the United Church Board for Ministerial Assistance (UCBMA), the philanthropic arm of the Pension Boards, has been offering direct financial support and leadership programs for United Church of Christ clergy, lay church employees and their surviving spouses. Because we know the challenges and often sacrifices that are made while serving in ministry, we seek to relieve worries and financial demands and thereby ensure that persons receive the care of Church in their time of need.

The ministries of UCBMA are made possible by the generosity of individuals and congregations to the Christmas Fund Special Mission Offering and Our Church's Wider Mission and are further subsidized by the Ministerial Assistance Fund.

AVAILABLE GRANTS FOR RETIREES

PENSION SUPPLEMENTATION

Retirees who qualify receive monthly financial assistance that brings their total household income up to a minimum level established annually.

HEALTH BENEFITS SUPPLEMENTATION

Retirees who qualify receive a credit to their UCC Medicare Supplement Plan invoice that lowers premium payments.

MA MONTHLY GRANTS

Retirees and persons on long term disability who qualify receive monthly financial assistance to meet basic living expenses.

CHRISTMAS THANK YOU GIFT CHECKS

Retirees who qualify receive a gift at Christmas as a way of saying "thank you" for years of service to the United Church of Christ. These gifts are generally recommended by a Conference Minister.

APPLICATION PROCESS

Persons seeking assistance complete one application and Pension Boards' staff review it for all possible combinations of assistance. The chart on the back of this sheet contains the basic qualification/disqualification criteria. Applications are available at www.pbucc.org or by calling 1.800.642.6543 ext. 2714.

Please Note: The amount and continued eligibility of grants is reviewed annually and is based on the total dollars available, as well as the number of eligible persons applying at any given time. There is no guarantee that grants will be available beyond the current calendar year. Grants are considered a gift and do not need to be reported unless gifts must be reported. Grants do not impact regular pension payments made by the Pension Boards.

MINISTERIAL ASSISTANCE ELIGIBILITY CHART

Applicants submit one application and Pension Boards' staff review it for all possible combinations of assistance.

The chart below includes the basic qualification and disqualification criteria. A checkmark in a column means that criteria is effective for that grant.

Qualification/Disqualification Criteria	Pension Supplementation		Health Benefits Supplementation		MA Monthly Grant		Christmas Thank You Check
MA Annual Application Grants are a gift determined annually and are subject to Board-established eligibility criteria and available funds. Fully completed applications are required to make informed decisions.	✓		✓		✓		
Income Tax Form 1040 A 1040 Tax Form must be submitted with your MA Annual Application in order to verify income.	✓		✓		✓		
Age Applicants must be at least 65.	✓		✓		✓ or on disability		✓
UCC Status If clergy , current UCC standing is required. If surviving spouse, clergy spouse must have been authorized by the UCC at the time of death. If lay church worker , must have worked for a UCC congregation, Association, Conference, or National entity for at least 10 years. If surviving spouse, lay spouse must have worked at a UCC related entity for at least 10 years.	✓		✓		✓		✓
Currently participating in the Pension Boards' UCC Medicare Supplement Health Plan			✓				
Currently receiving an annuity/pension payment from the Pension Boards	✓						
Years of Dues-Paying Membership in the UCC Annuity Plan Full amount for those with 30 years of membership; otherwise, the amount is pro-rated.	✓						
Total household income Includes, but is not limited to, Social Security, other retirement benefits and income streams and current earnings of applicant and spouse.	Clergy Or Lay Worker <\$33,700;	Surviving Spouse <\$25,275	Below \$45,000		<\$40,000 or extenuating circumstances		<\$40,000 or extenuating circumstances
Assets Includes retirement, savings, checking and money market accounts as well as stocks, bonds, mutual funds, cash, property and vehicles.	Own a House <\$75,000	No House <\$100,000	Own a House <\$75,000	No House <\$100,000	Own a House <\$75,000 or extenuating circumstances	No House <\$100,000	
Financial need Must demonstrate the need for financial assistance.					✓		
Household debt Includes, but is not limited to, credit card, medical, and educational debt. Does not include home mortgage.					Below \$25,000		
Marital Status of Surviving Spouse If a surviving spouse of a clergy or lay worker remarries, they are no longer eligible for any form of assistance.	✓		✓		✓		✓
Medicaid and/or Nursing Home Individuals who are Medicaid recipients or Medicaid eligible do not qualify. Generally, this includes persons living in a skilled nursing facility or nursing home.	✓		✓		✓		