

Employer Adoption Agreement

The Church Pension Fund Clergy Pension Plan or International Clergy Pension Plan

Use this form to:

Adopt The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan) or the International Clergy Pension Plan (ICPP) for your organization.

Who should complete the form:

An authorized representative of (i) a religious order or (ii) an organization that is associated with The Episcopal Church (but not subject to the authority of the Church) that, in either case, wishes to adopt the Clergy Pension Plan or ICPP, as applicable, for all eligible¹ clergy serving at that organization.

Note: An organization that is subject to the authority of The Episcopal Church (other than a religious order) is not required to complete this adoption agreement because the Clergy Pension Plan or ICPP, as applicable, automatically will be adopted for that employer when it enrolls its first eligible cleric.

Section 1 – Employer and Plan Information

Employer Name _____

Mailing/Billing Address _____

City _____

State _____

Zip Code _____

Country _____

Phone Number _____

Email Address _____

Plan Being Adopted *(check only one)*

Clergy Pension Plan

International Clergy Pension Plan

Plan Adoption Effective Date² (MM/DD/YYYY) _____

Section 2 – Employer Acknowledgements and Signature

By signing below, the above-referenced employer:

- certifies that it is associated with The Episcopal Church and, if located in the U.S. or otherwise subject to U.S. tax law, also a not-for-profit organization under section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and agrees to immediately notify The Church Pension Fund (CPF) in writing if its status changes;
- acknowledges and agrees that it must enroll all eligible clergy in the plan (as determined by the terms of the plan) who are (or were) serving at the employer during the period beginning on the plan adoption effective date specified in Section 1 and thereafter (unless it subsequently terminates its participation in the plan);
- acknowledges and agrees that monitoring eligibility and reporting compensation (in each case, in accordance with the terms of the plan) is not the responsibility of CPF but solely that of the employer;
- understands that CPF retains the right to request supporting documentation at any time to verify the details of a cleric's service at the employer;
- acknowledges that CPF can amend the plan at any time, without notice and for any reason;
- acknowledges that (i) it may completely stop paying assessments to CPF (and thereby terminate its participation in the plan) only as of the last day of a calendar year, and (ii) the rights of all of its active employees to benefits accrued under the plan as of such date, to the extent then funded, will immediately become fully nonforfeitable by reason of such plan termination;

¹ Eligibility is determined solely by the terms of the plan.

² If a retroactive date is used, the employer is required to enroll every eligible cleric who is or was serving during the applicable time period (including a cleric who may no longer be serving at the employer). Interest may be charged on any past due assessments, in accordance with the terms of the plan.

- acknowledges that, if it chooses to terminate its participation in the plan for any reason, it may again rejoin the plan (by completing, signing and submitting a new employer adoption agreement), but only on a prospective basis—meaning that assessment payments for any period of non-participation will not be accepted—and subject to any additional conditions that CPF may establish in its sole discretion (such as a waiting period); and
- indemnifies and agrees to hold CPF and its affiliates, the benefit plans maintained by CPF and its affiliates and all trustees, officers, employees, agents, plan administrators, fiduciaries, representatives, participants and beneficiaries thereof harmless from any and all liability, damages, costs (including, without limitation, attorney’s fees and costs of investigations and defense), taxes and penalties arising from any violations of this Section 2.

Employer’s Authorized Signature

Date (MM/DD/YYYY)

Print Name

Title

Submit the completed and signed form to:

The Church Pension Fund, 19 East 34th Street, New York, NY 10016, Attn: Client Services or email to admin-assist@cpg.org. **Please retain a copy of the completed adoption agreement for your records.**

If you have any questions, call us at (866) 802-6333, Monday to Friday, 8:30AM to 8:00PM ET (excluding holidays).

To enroll an eligible cleric in the plan:

Once your adoption agreement has been processed by Client Services, you can enroll an eligible cleric in the Clergy Pension Plan through [My Admin Portal](#) (MAP). To enroll an eligible cleric in the ICPP, please use the [Employment Change Form](#) instead.