

Orthodox Church in America Pension Plan Parish Annual Pension Compliance Checklist



Parish Name: _____ Address: _____ Diocese: _____

Please complete the following information for each member of clergy and employee of your Parish.

Plan Participation has been mandated by All American Councils for all clergy members under age 60. Plan Participation is open to all lay people working 20 or more hours per week who join before age 60.					Contribute 12% of cash salary (6% Employee + 6% Employer)		Contribute 12% of housing (6% Employee + 6% Employer)			Member has Summary Plan Description and Highlights Brochure Yes/No	If not participating, a document on file states the Plan was offered and declined. Yes/No
Name	Clergy or Lay Person?	Currently Contributing to the Plan? Yes/No	Lay Person Working 20+ hours per week? Yes/No	Under age 60? Yes/No	Annual Salary Amount	Monthly Salary Contribution Amount	Annual Housing Allowance Amount	Fair Rental Value of Parish Provided Housing	Monthly Housing Contribution Amount		

Special Notes: _____

Enrollment and Beneficiary Forms as well as Summary Plan Descriptions and Highlights Brochures are available at www.oca.org. Choose Central Administration and then Pension Board.

I certify that the above information is true and accurate to the best of my knowledge.

Parish Official Signature

Parish Official Printed Name

Parish Official Title

Email Address

Telephone Number

Date

Thank you for your attention to and support of the Orthodox Church in America Pension Plan. If you have any questions regarding this form or the Plan, please contact us.

Acting Plan Administrator Michael S. Stieglitz Mstieglitz@oca.org 516-922-0550 x142	Plan Bookkeeper Barbara Anderson banderson@oca.org 516-922-0550 x144	Pension Office PO Box 675 Syosset, NY 11791 Fax: 516-624-3153
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Please return a signed copy of this form to the Pension office by June 28th.