



19 East 34th Street
New York, NY 10016
(800) 223-6602
www.cpg.org

New Assignment Notice

To ensure that our records are current and that, in the future, we can calculate retirement benefits for you and your family correctly, please complete the New Assignment Notice and return it to us as soon as possible. Please be sure that the form is signed by you and a representative of all churches or church-related units that provide compensation. As you complete the form, the following definitions may be helpful:

Source: The church (or church-related unit) that pays any or all of your compensation. Include the full name and mailing address.

Effective Date: This is the beginning date for your compensation in your new assignment.

Cash Stipend: The stipend paid, including bonuses, fees, one-time cash payments, tuition paid for dependents, any salary reduction arrangements or employer contributions used to fund an annuity, tax-sheltered annuity, 403(b) plan, or other tax-deferred benefit, and amounts excluded from income used to pay for a benefit from a cafeteria plan or for a qualified transportation fringe benefit. This also may include all or a portion of severance pay. (If you need to report severance payments, please contact us directly instead of using this form.)

Social Security: Any payments given to you to offset your cost for self-employment taxes in accordance with SECA.

Utilities: Amounts you receive for utilities (including fuel, gas, electric, etc.), or which are paid for you.

Housing: The Clergy Pension Plan uses housing to calculate the total compensation on which assessments are based. The amount of housing that is assessable depends on whether or not housing is provided and, if so, how it is provided.

- If housing is provided rent-free (but neither a cash housing allowance nor a housing equity allowance is provided), the housing allowance is calculated at 30% of the sum of the cash stipend, utilities and Social Security reimbursements.
- If both housing and meals are provided cost-free (but neither a cash housing allowance nor a housing equity allowance is provided), the housing allowance is calculated at 40% of the sum of the cash stipend, Social Security reimbursements and utilities.
- If a cash housing allowance or a housing equity allowance is provided (but neither housing nor housing and meals are provided rent-free), the assessable housing allowance is the actual dollar amount received.
- If housing or housing and meals are provided rent-free and an additional cash housing allowance is provided, for pension purposes, the value of the assessable housing is calculated to be (1) 30% (when only housing is provided) or 40% (if both housing and meals are provided) of the sum of the cash stipend, Social Security reimbursements plus utilities or (2) the actual dollar amount of the cash housing allowance received, whichever is greater.
- If housing or housing and meals are provided rent-free and an additional housing equity allowance is provided, for pension purposes, the value of the assessable housing is calculated to be (1) 30% (when only housing is provided) or 40% (if both housing and meals are provided) of the sum of the cash stipend, Social Security reimbursements and utilities plus (2) the actual dollar amount of the housing equity allowance received.
- If cash compensation is received from more than one Church employer but only one provides housing, all of the employers are assessed a proportionate share of the housing.
- Please note that a Church employer may provide a housing equity allowance in the form of employer contributions to an annuity, tax-sheltered annuity or other 403(b) plan. If these types of employer contributions are reported as part of the cash stipend, it is very important that they are not also reported as housing equity allowance. Otherwise, they will be double counted.

If you have any questions, call us at (866) 802-6333, Monday – Friday, 8:30AM – 8:00PM ET (excluding holidays). We wish you every success in your new position.



19 East 34th Street
 New York, NY 10016
 (800) 223-6602
 www.cpg.org

New Assignment Notice

When you begin a new assignment, please sign and complete this form and return it to us as soon as possible. Representatives of all churches or church-related units that provide compensation should also sign it. Retirement benefits for you and your family are based on the information we have about the amount of your compensation, so it is important that we have accurate, up-to-date information. Return this form to The Church Pension Fund, 19 East 34th Street, New York, NY 10016. If you have any questions, call us at (866) 802-6333, Monday – Friday, 8:30AM – 8:00PM ET (excluding holidays).

Personal Information

First Name	MI	Last Name		
Address	City	State	Zip	
Home Phone	Cell Phone	Email		
Your Diocese (Canonical Residence)				
Previous Employer		Date Your Compensation Ended		

New Assignment

If you have more than one new source of employment, complete both sections. If you have more than two, complete an additional copy of this form. List all amounts on an annual basis. For explanations of each category, see the accompanying letter.

Source 1

Church (or church-related unit)	Phone		
Address	City	State	Zip
Your Title	Effective Date	Full Time	Part time

Compensation (per year)

\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	Housing Provided?	Meals Provided?
Cash Stipend	Social Security	Utilities	Cash Housing Allowance	Housing Equity Allowance	Yes No	Yes No
Employer's Signature				Date		

Source 2

Church (or church-related unit)	Phone		
Address	City	State	Zip
Your Title	Effective Date	Full Time	Part time

Compensation (per year)

\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	Housing Provided?	Meals Provided?
Cash Stipend	Social Security	Utilities	Cash Housing Allowance	Housing Equity Allowance	Yes No	Yes No
Employer's Signature				Date		
Your Signature				Date	ID# (for CPF use)	