



Retirement Plans for Churches

CLA Religious Webinar Series

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Speaker Introduction

- **Bruce Bruinsma, CEO & Co-Founder, Envoy Financial**

Bruce Bruinsma is the CEO / Co-Founder of Envoy Financial and the Live with Meaning Foundation, which inspires and empowers people for a lifetime of ministry. In addition, he has started several businesses that financially support ministry in the US, Europe, and Asia.

Bruce holds an MBA from the University of California, Berkeley and has more than 40 years of professional experience in retirement planning and finance. He is the authors of two books, consults with Christian ministries worldwide, and is an energetic, sought-after presenter.



Learning Objectives

- Identify why it's important to consider a retirement plan for your church
- Recognize the legal requirements of a church retirement plan
- Discuss different plan options, specific to churches
- Discuss the role of the plan administrator



Retirement Plans for Churches

Requirements & Best Practices

Keeping it legal and making it work





Speaker

Bruce Bruinsma

CEO & Co-Founder Envoy Financial
& Live with Meaning Foundation





Understanding Retirement.





Problems when there is no Plan.





A new definition of retirement.





What is a Plan?





Church Plans & ERISA





Keeping 403(b)9 Church Plans Compliant.





Wrap-Up Highlights.





Speaker

Bruce Bruinsma

CEO & Co-Founder Envoy Financial
& Live with Meaning Foundation





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