



# The Board of Pension and Health Benefits of the California-Pacific Conference presents...

## A Clear Path to Retirement April 28-29, 2026

*A retreat workshop for clergy and spouses at all stages in their careers.*

### Clergy Benefits

*Todd Creviston*



The presentation from Wespath Benefits & Investments on Tuesday, April 28, 2026, will answer questions relating to all retirement plans available to clergy serving The United Methodist Church.

*Todd Creviston, Benefits Educator Health Promotion Manager, from Wespath Benefits & Investments will provide in-depth information to:*

- Equip you to make informed decisions regarding distribution options
- Help you understand all the clergy retirement plans, including Compass
- Assist you with investment options at Wespath
- Familiarize you with participant services and tools
- Interpret your personal pension projection printout
- Be available for private consultations

*Todd Creviston has been with Wespath since April of 2012. During his tenure with Wespath has served as a Benefits Educator and Health Promotion Manager. He recently moved 100% into Benefits Education which will allow Todd to tap into his 30 years of experience in health education, well-being, and benefits education. Off hours and weekends, Todd enjoys cooking, especially BBQ and spending time with his family.*

### Achieving Financial Wellness & Estate Planning Basics

*John Garrison*



Mr. Garrison, our EY Representative, will be with us Wednesday, April 29, to lead a morning packed full of simplified and practical ways to take full command of your financial wellness, and to plan for the future.

#### Achieving Financial Wellness, will include:

- Setting and living into your financial goals
- Managing your household balance sheet
- Planning for a secure retirement

#### Estate Planning Basics

Planning for “the inevitable” isn’t easy, but without a plan, your assets may not be distributed as you wish, could be delayed in court, and may leave your family financially vulnerable. Estate planning isn’t just for the wealthy — it’s for everyone who wants to protect their loved ones and ensure their wishes are honored.

#### In this workshop, we will cover:

- What an estate includes
- Pros and cons of probate
- The role of trusts
- Essential estate planning documents
- Estate taxes and ways to reduce them
- Available resources to help you plan

*John joined EY in 2016 and has over 10 years of experience delivering live seminar workshops as well as webinar presentations. His previous experience was with a Fortune 150 company for over 25 years in Human Resources. In his last corporate position, he was responsible for leading Benefits Administration for active and retired employees. Given this experience, John is comfortable leading workshops in retirement planning, health and welfare benefits, executive benefits, education funding, estate planning, deferred compensation, and event driven topics including benefits enrollment, change in control, and pension changes and choices.*

#### Tuesday, April 28

11:30 am	Arrival and Registration
12:30 pm	Lunch
1:30 pm	Wespath Clergy Benefits <b>Todd Creviston</b> Wespath Benefits & Investments
4:00 pm	Medicare Presentation <b>Guillermo Barron</b> Social Security Administration
5:10 pm	InterFaith Federal Credit Union <b>Oscar Rosso</b>
5:30 pm	Dinner
6:30 pm	Fellowship--On Your Own

#### Wednesday, April 29

8:00 am	Breakfast
8:30 am	Gathering
8:45 am	Conference Retiree Health Plan <b>Todd Creviston &amp; Wanda Bethea</b>
10:15 am	Achieving Financial Wellness <b>John Garrison</b> EY Financial Planning Services
11:45 am	Estate Planning Basics <b>John Garrison</b> EY Financial Planning Services
12:30 pm	Lunch
1:30 pm	Old School Skinny <b>Aerick Luckie</b>
2:45 pm	Imagining the Next Chapter <b>Marlene Urban-Funk</b>
5:30 pm	Dinner
6:30 pm	Individual Consultations/Dismissal

**Individual consultations** with our Wespath representative will be available at designated times during the two-day program. Sign-ups will be taken onsite for these appointments.

#### Full Package Price

Overnight accommodation, all 5 meals, all programs:  
\$95 per person

#### Build-Your-Own Package

Overnight accommodations:  
\$50 per person

<http://www.calpacumc.org/retirementpath2026>

Mater Dolorosa Passionist Retreat Center  
700 N. Sunnyside Ave., Sierra Madre, CA 91024  
(626) 355-7188



**OLD SCHOOL SKINNY**

*Aerick Luckie*

Preparing for retirement is not only a spiritual and emotional transition, but also an opportunity to embrace new rhythms of health, joy, and community. This engaging and uplifting session invites you to experience movement as a source of energy, connection, and well-being. Designed to be inclusive and accessible to all fitness levels, this class focuses on fun, authenticity, and community connection through simple, joyful movement. Participants will be invited to move at their own pace in a welcoming environment that celebrates creativity, laughter, and the freedom to simply enjoy being present in their bodies.

*Aerick “Luckie” Luckie is a Los Angeles-based dancer, choreographer, and fitness instructor best known for co-creating the 90s-inspired cardio dance fitness class Old School Skinny and for his most recent appearance as KTLA’s LA Unscripted.*

*Blending his passion for dance and wellness, Luckie has built a dynamic career that merges choreography, high-energy fitness, and community engagement. Through Old School Skinny, which he co-founded with J’Nelle Luckie, he brings the spirit of 1990s dance culture to life with nonstop cardio routines set to classic 90s hits.*

### Imagining the Next Chapter

*Marlene Urban-Funk*



Retirement is more than the conclusion of a career in ministry—it is a sacred transition into a new season of life and vocation. This interactive session invites us who are contemplating retirement to pause, reflect, and prayerfully imagine what the next chapter may hold.

*Marlene serves as the part-time Associate Director for Retreat Ministries for the Cal-Pac Conference of the UMC. Marlene is ordained clergy in the Christian Church (Disciples of Christ). She attends and leads as many retreats as she can pack into her schedule. Marlene has a passion for the blending of creativity and spirituality. New learning opportunities and female groups of mutual care are high on the list of priorities for Marlene these days. Marlene is a native of Colorado Springs and she has served in Oklahoma, France, Colorado and Kansas, prior to moving to SoCal. She is grateful on a daily basis for her daughter (23) and her son (21). Marlene lives in Wrightwood, CA with her husband, Kenny Funk, Director of Camp and Retreat Ministry for Cal-Pac. Her hobbies include crocheting, sewing, yoga and a variety of creative projects.*

