



## Letter from the Vice President

Dear Friends,

It has been an important year for the Clergy Assurance Fund! In June 2023, I assumed the responsibilities of service as the Vice President of the Fund, and James Pope assumed the role as Interim Treasurer after 17 years of serving as Vice President.

This year we also approved and passed a revision of our bylaws, which modernized our governance structures. We also hired two new Interim Chaplains, the Revs. Luke Zerra and Josiah Daniels to help us more fully connect with the clergy of Pennsylvania who we serve.

I am grateful for the continued work of Patricia Blakley who manages our fund Operations. I am also grateful for the work of the Acting Committee and Corporation who steward the mission and the resources entrusted to us.

Last, let me offer an extraordinary thank you to James Pope for his years of service to our ministry. His wisdom and dedication has been a deep gift to our work.

I commend to you the pages within this report.

Peace,

**The Reverend Noah H. Evans**

Vice President  
Clergy Assurance Fund



## Letter from the Chaplain

Dear Friends,

Serving the Clergy Assurance Fund as Interim Chaplain is an honor and privilege. I was called to serve the clergy of Pennsylvania in April and look forward to getting to know you and hearing how the Clergy Assurance Fund can continue to serve you. I currently also serve as Priest-in-Charge of St. Peter's Episcopal Church in Brentwood (just South of

Pittsburgh) and as Associate Dean of the Stevenson School for Ministry in the Diocese of Central Pennsylvania.

My work thus far has been connecting with clergy and dioceses across Pennsylvania. I have enjoyed meeting with you at clergy conferences and diocesan conventions this Spring and am thrilled to have enrolled several clergy for CAF's free introductory policy and for further coverage. I have also spoken with many clergy about sabbatical and wellness grants. As I meet with clergy across the commonwealth, I am excited to envision ways that the Clergy Assurance Fund can better serve the clergy of Pennsylvania, advertise our offerings, and streamline our processes.

As your Clergy Assurance Fund chaplain, I am here to serve you. Please do not hesitate to reach out to me at [chaplain@clergyassurancefund.org](mailto:chaplain@clergyassurancefund.org).

In Christ,

**The Rev. Dr. Luke Zerra**

Interim Chaplain



### **Letter from Operations**

Dear Friends,

I joined the Clergy Assurance Fund in the Spring of 2022, and the work has engaged me fully. Whether we are helping an insured with a medical expense or helping a beneficiary access a death benefit the work is meaningful and gratifying.

The office is open four days a week (Monday through Thursday) and phones are answered promptly no matter what day of the week or time of day. Need to change your beneficiaries or need a copy of your coverage? We can mail or email forms to you on request. Are you estate planning? We are happy to speak with your attorney about your policies.

Thank you for entrusting your life insurance investment with us. After 255 years we remain committed to the long-term well-being of clergy and their families.

**Patricia Blakely**

Operations Manager



## Benefit Programs

<https://clergyassurancefund.org/clergy/wellness-fund-assistance>

**WELLNESS FUNDS:** Insured clergy and immediate family members may access Wellness Funds for a variety of needs. The most common use of these funds are reimbursements of medical, dental and prescription drug expenses that have not been covered by medical insurance but we also fund spiritual retreats (\$1,500 maximum), counseling, and other similar needs. There is a limit of \$5,000 per family for each CAF fiscal year. (April 1-March 31)

To request a Wellness Fund grant an application is completed by the cleric and submitted to the diocesan bishop or designated pastoral care officer. When a Wellness Fund request is made, the bishop can see if other diocesan funds may be used to address the need and provide pastoral care.

When the bishop has signed the application, it is submitted to the Corporation's office for payment. Payments can be made to the cleric as reimbursement for funds already disbursed or directly to service or care providers for fees yet to be paid.

<https://clergyassurancefund.org/clergy/wellness-fund-assistance>

**SUPPLEMENTAL INCOME:** The surviving spouse may be eligible to apply for need-based Supplemental Income. Grants are intended to help provide an adequate margin of income for fixed expenses such as housing, utilities, insurance, and medical care. The process begins with an application submitted in February for grants determined in March and distributed quarterly beginning in April. Funds may be available at other times of year. Please contact the Chaplain at [chaplain@clergyassurancefund.org](mailto:chaplain@clergyassurancefund.org)

<https://clergyassurancfund.org/family/supplemental-income>

**EDUCATIONAL ASSISTANCE GRANTS:** Educational Assistance grants of up to \$7,500 per year are available to the children of deceased insured clergy through the completion of undergraduate education. These are also generally approved in March although requests can be submitted at other times as needed. Call to determine if we still have funds available: 215-557-6960

<https://clergyassurancefund.org/family/educational-assistance-grant>

**EMERGENCY AID:** Emergency Aid funds are available for widowed spouses of deceased clergy and their dependent children. These need-based funds can be used for various emergency life circumstances. Grants are capped at \$5,000 per family for each CAF fiscal year (April 1 - March 3). Potential applicants should complete the form found at the link below.

<https://clergyassurancefund.org/family/emergency-aid-grant>.

**SPOUSAL DEATH BENEFIT:** If your spouse or life partner dies, please contact the office at 215-557-6960 or [operations@ClergyAssuranceFund.org](mailto:operations@ClergyAssuranceFund.org).

You will be asked to submit a copy of the death certificate and, possibly, additional documentation in the case of a non-marital relationship based on the individual circumstances.

**SABBATICAL GRANTS:** The Clergy Assurance Fund offers sabbatical grants of up to \$5,000 to Episcopal clergy currently serving in Pennsylvania. The purpose of a sabbatical is to promote personal, spiritual, professional, and academic enrichment for continued ministry. A written description of the sabbatical plan should be submitted to the Bishop no less than 90 days before it commences. The application is available from the CAF office. [Office@ClergyAssuranceFund.org](mailto:Office@ClergyAssuranceFund.org)

**INSURANCE CLAIMS:** When the insured clergy dies the surviving family should contact the office of the Corporation to report the death. A copy of the death certificate is required to release the death benefit to the designated beneficiaries which is normally accomplished within 10 days of receiving the certificate. [office@clergyassurancefund.org](mailto:office@clergyassurancefund.org) or 215-557-6960

**UPDATE YOUR INFORMATION:** Have you updated your information? Visit the website:

<https://clergyassurancefund.org/clergy/change-policy-information>

**UPDATE YOUR BENEFICIARY:** Claims for death benefits are issued to the beneficiaries named in your file at the office. If there is a discrepancy based on death or life changes such as divorce or separation, a claim may be held up. We can check your file if you call us at 215-557-6960.

<https://clergyassurancefund.org/clergy/beneficiary>

**Additional Paid Coverage:** If you wish to obtain additional insurance coverage at very competitive rates (rates that are highly subsidized from our earnings on investments), call the office at 215-557-6960 or email [Office@ClergyAssuranceFund.org](mailto:Office@ClergyAssuranceFund.org) for a rate quote, then complete the form on the web site, print it out, and mail it to us with your initial premium payment.

Additional Coverage

24-40: to 150,000

41-50: 100,000

51-60: 75,000

61-72: 50,000

<https://clergyassurancefund.org/clergy/additional-coverage>