

## Eder Financial Retirement Readiness Seminar

### Case Studies for Retired Clergy

Prepared by James Benedict, retired Church of the Brethren pastor  
and author of *Ethics for the Set-Apart Ministry*

1. Pastor V retired after 17 years at Elkhorn Church of the Brethren and 32 years in all as a pastor. Because Pastor V and her/his spouse owned a home in the area, children and grandchildren lived nearby and Pastor V's spouse was continuing to work, Pastor V spoke to the district executive about remaining as a member at the Elkhorn congregation and attending again after a suitable interval to allow the new pastor to establish relationships.

Two years after retiring, with the permission of Pastor M. the new pastor, Pastor V and spouse began attending again. All seemed to be going well and it was good to be able to worship with former parishioners who became friends. After several months, Pastor V learned that one of her/his closest friends from the congregation was in the hospital. Pastor V was a volunteer at the hospital and after her/his volunteer shift decided to stop in to see this friend. Pastor V was received with great appreciation and talked to her/his friend about a serious upcoming surgery.

"Has Pastor M been in to see you?" Pastor V asked.

"No," the friend answered. "We didn't call him/her. We know he/she is busy. Besides, now that you have been here, we don't need to bother Pastor M. You can stop by whenever you are volunteering and that way we're covered."

What ethical issues or concerns are raised by this situation? How should Pastor V respond? Should Pastor V notify Pastor M that the person is in the hospital? Why or why not? What might be done to prevent similar situations from arising in the future?

---

2. L. was a well-known executive within a Christian non-profit organization that served congregations within their denomination for many years, and she/he has retired late last year. After some traveling with his/her spouse, L. becomes interested in pursuing something part-time to supplement income and get out among people. A sales job with a major independent Christian resource company becomes available. This would involve visiting congregations and pastors to pitch the various offerings of the company, from curriculum to choir music to office management software. In the job interview, L. is told by the sales manager (who will make the decision about hiring) that L. seems like an ideal candidate because of her/his pre-existing relationships with the churches and pastors in her/his former district and connections to bishops and executives from other denominations. L. believes in the quality of the products the company produces and is comfortable with sales. Nonetheless, L has some concerns.

What concerns might L. have? What ethical challenges come with a job of this nature? What are some possible ways to mitigate the ethical vulnerability in such a scenario? To whom might L. speak about his/her concerns?

---

3. Retired Chaplain X hears from a grandson that the pastor at the grandson's church is preaching "political" sermons and even encouraging the congregation to vote for a particular party and set of candidates. Even though the chaplain actually supports the same party and candidates, he/she is aware that this puts the congregation at risk for losing their non-profit status. The grandson, who is in law school, knows this, too, and has spoken to the pastor about it. Nonetheless, the practice has continued. So the grandson has recorded a few of the sermons and wants to send them to the IRS Exempt Organizations Classifications Office.

What advice would you give Chaplain X about how to handle the situation? Should he/she try to dissuade his/her grandson? Why or why not? Should he/she "tip off" the pastor or other congregational leaders? Why or why not? What virtues and values should be considered in deciding what to do?

---