

FINANCIAL LEADERSHIP JUMPSTART APPLICATION



STEP ONE: PERSONAL INFORMATION

Name _____

Current Mailing Address _____

Cell Phone _____ Work Phone _____

Email _____

Gender _____ Date of Birth _____ Marital Status _____

Spouse's Name _____

Ages of your children _____

Will your spouse participate, also? Yes No (If "yes", please complete the information below.)

Spouse's Email _____

Spouse's Phone _____

Covenant Credential: OWSa OWSe COM CM ML WML BVL*

**Ministers holding a BVL may be eligible for FL funds; please review eligibility guidelines and contact the Director of Financial Leadership for more information.*

Ministerial Dues

Did you pay ministerial dues this year? Yes No

Did you pay ministerial dues last year? Yes No

Church Information

Church Serving Name: _____

Church Address: _____

Role/Position (ex: Lead Pastor): _____

Church Chair: _____ Conference: _____

Average Worship Attendance: _____ Total Church Membership: _____ Church Budget: _____

Where You Serve: Urban Suburban Rural Other

Church History (begin with current position, moving chronologically backwards)

CHURCH	LOCATION	POSITION	DATES

Academic Information

SCHOOL	LOCATION	DEGREE	DATES

STEP TWO: FINANCIAL NARRATIVE

● Describe how your family of origin handled financial matters. Please provide a short example.

● In what ways has your family history given shape to your approach to finances?

● **How did you choose this particular offering? What is its sustaining value for you? What are your hoped for outcomes?**

● **Give an outline of how you plan to continue to supplement your learning in this particular area after the event you have participated in is over. List your future learning goals and potential resources to be used.**

FOUR ELEMENTS TO DEFINE PERSONAL FINANCIAL WELL-BEING

by Janneke Ratcliffe (Jan 27, 2015)

You probably have a few goals in mind when it comes to thinking about your financial life. You might think about taking more control over bills, or getting to a specific point like paying off a credit card, or making an important purchase.

Savings and income are part of financial well-being, but we learned that they're not always the most important part. Instead, when people talked about their own financial well-being, four main elements came to light.

FEELING IN CONTROL

People who have high levels of financial well-being feel in control of their day-to-day and month-to-month finances. They cover their expenses and pay their bills on time, and generally they do not worry about having enough money to get by. This is not just about having money, they told us, it's about managing it. Think of this as having financial security, in the present.

CAPACITY TO ABSORB A FINANCIAL SHOCK

Whether they get in a car accident or are temporarily laid off from a job, these consumers have a safety net such as savings, insurance, or family to help stop a shock from turning into a longer-lasting setback. One way to describe this is feeling financial security, for the future.

ON TRACK TO MEET GOALS

Consumers with a higher sense of financial well-being tell us they are on track to meet their financial goals. Whether or not they have a formal financial plan, they are setting goals that are important to them, and working toward those goals. Think of this as moving toward financial freedom, for the future.

FLEXIBILITY TO MAKE CHOICES

These consumers have the financial freedom to make the choices that allow them to enjoy life, whatever that means to them. Whether that is taking a family vacation, going out to eat, or working less to spend more time with family, these consumers have the financial flexibility to do what they value and what makes them happy. This can be described as having financial freedom, in the present.

Applying this framework to your own financial life might help you feel more satisfied with the decisions you make too. When you face a financial choice or task, consider how your actions might affect financial security and financial freedom, today and in the future.