1. **Personal Information**

Name: Social Security Number:

Spouse Name (if married): SSN:

Home Address:

City: State: Zip:

Phone: E-mail:

Have you or your spouse missed filing any federal and state income tax returns?

If yes, what year(s) have you missed?

Do you have any outstanding IRS or state tax liens? No Yes (If yes, please provide information in an attached document)

1. **Clergy Information**

Are you serving a local Missouri United Methodist congregation under appointment of the Missouri Annual Conference? Yes: No:

*If yes,* in what capacity?

Elder: Deacon: Licensed local pastor: Other (specify):

Name of church:

District:

*If no,* what is your current status? (check appropriate box)

* Previously under active appointment in the Missouri Annual Conference and currently on leave.   
  Date you began this status:
* Full-time seminary student who is a declared candidate for ordained ministry within the Missouri Annual Conference. Name of Seminary:
* Other (specify):

1. **Financial Coach**

Applicants and recipients must work with a financial coach to outline a basic financial plan to identify and prioritize financial needs and opportunities. Please contact the C2FM Director to be assigned a coach. There is no cost to work with a financial coach, but both you and your spouse are expected to meet with him/her.

1. **Description of Financial Need**

Please indicate grant(s) for which you wish to be considered.

Scholarships:

Recipients are expected to meet with a financial coach to develop a financial plan appropriate for their stage in life.

* Higher Education Scholarships: Scholarships to support higher education (e.g. bachelor degree, community college, trade/tech schools, professional certification, etc.). Match to funds from local churches is encouraged. Up to $1,000 per year, maximum $3,000
* Capstone Scholarships: Funds for seminarians who are certified candidates in Missouri and have demonstrated merit and high potential for a fruitful ministry. Applicants for these funds must also qualify through the existing Missouri United Methodist Foundation (MUMF) scholarship process.

Life Stage Grants:

These grants seek to provide an opportunity to receive one-on-one coaching to develop a financial plan and receive a grant to address the highest financial priority identified in the plan.

* Supplement Family Health Insurance: Up to $5,000 to assist in the retirement or avoidance of medical debt incurred by the pastor, the pastor's spouse and/or dependent children.
* 529 Education Match: Up to $1,000 per child not to exceed $3,000 per family to fund a 529 College Savings Plan or offset existing college expenses of currently enrolled students.
* Retirement Savings Assistance: Up to $2,500 to be paid into a retirement account to reward pastors who have practiced sound financial practices over a period of years demonstrated by showing they have no debt except for a home mortgage that is no greater than 75% of the value of the property.
* Student and Consumer Debt Assistance: Up to $5,000 to assist in the retirement of unsecured loans (i.e., credit card, unsecured personal loans, student loans, etc.)
* Clergy relocation: Clergy/families may receive up to $1,000 to assist in transitioning from a parsonage to purchase a home, or assist clergy who have been transferred by the Conference and have unreimbursed expenses caused by the move.

Emergency Grants:

Health and household emergencies may create financial problems in households where emergency funds have been depleted. Recipients are expected to meet with a financial coach to develop a financial plan in order to reduce the impact of future emergencies.

* Health and Household Emergency: Up to $5,000 to offset the cost of an unexpected household event such as a job or property loss, or expenses incurred as a result of a family member's health (e.g. travel expenses incurred for treatment)
* CPA/Attorney Counsel for Clergy: Up to $5,000 to assist with the cost of tax liabilities or professional services needed to assist a pastor with legal and/or tax liabilities.

Please provide a brief narrative description of your immediate financial need or request, attach additional sheets if necessary.

1. **Additional information**

The Application Review Committee may request additional information to insure dispersed funds are used effectively. Please provide the following information with your application:

* Credit score
* A personal/household budget describing current monthly income and expenses.
* A personal/household net worth statement showing total assets, liabilities, and your net worth.
* A list of liabilities showing the creditor, interest rate, minimum monthly payment, and term or pay off date (if applicable).

1. **Privacy Policy**

In the course of reviewing applications and supplying grants and services, members of the Clergy and Church Financial Ministry’s Application Review Committee will see nonpublic information about you. This information is necessary in order to fulfill C2FM responsibilities. This information will be regarded as confidential.

There may be concerns that supervisors, colleagues or congregants may find out about personal aspects of your life you do not want shared. To encourage the use of the C2FM services, your involvement in this program is confidential, and will not be shared by C2FM personnel with anyone employed by the Missouri United Methodist Conference or shared with anyone outside those persons involved in providing C2FM services and assistance.

Storage of information collected will be protected through a combination of procedural, physical, and technological safeguards designed to protect confidentiality. Nonpublic personal information about you is disclosed to other persons or entities only as necessary and as required by law.

1. **Commitment**

By signing and submitting this completed application, you hereby agree and commit to the following as conditions for receiving grant funding.

* You and your spouse will meet with a financial coach to review your initial application information and to develop a personal financial management plan.
* You and your spouse will meet with a financial coach after the initial meeting on a periodic basis, but no less than once per calendar quarter to review your progress toward meeting the goals of your personal financial management plan.
* Participate in the *Wespath Personal Investment Plan (UMPIP).*
* Commit to financial ministry within your congregation and community. Examples of this include offering adult financial education programs to church members and the community, teen financial classes/bible study, youth classes/bible study on managing money, and outreach to targeted audiences such as prisoners, low income individuals, single mothers, seniors, or other audiences appropriate for your church’s location.

1. **Authorization**

By signing and submitting this completed application, you certify that all information provided is accurate.

Signature: Date:

Spouse’s Signature: Date:

Please mail the original signed copy of this application and accompanying materials to:

Chris Bouchard, Director

Clergy and Church Financial Ministries

P.O Box 1076

Columbia, MO 65205-1076