church and clergy financial ministry

C2FM

a ministry of the Missouri United Methodist Foundation

C2FM Grant Application

C2FM grants address a variety of economic challenges pastors may encounter

I. Personal Information

Name: ____

Spouse Name (if married): ____

Home Address: ____

City: ______________________ State: ______________ Zip: ___________

Phone: ____________________ E-mail: ______________________________

II. 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: ______________________________
- ☐ Retired Missouri Annual Conference retiree or spouse
    - Years of service prior to retirement: ________ (must be 5 years or more)
- ☐ Other (specify): ____

III. Financial Coach

Recipients must work with a financial coach to outline a financial plan to identify and prioritize financial needs and opportunities. Both you and your spouse are expected to meet with him/her at least once per quarter for two years after receiving a grant or until stated financial goals are met.

IV. Description of Financial Need

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

Scholarships:

- ☐ Practical Church Leadership (PCL): a yearlong certificate program through Dakota Wesleyan University
- ☐ Dakota Wesleyan University Degree: for graduates of the PCL seeking a masters/bachelor's degree at DWU, up to $2,000.
- ☐ Continuing Education: Scholarships to support higher education to include college degrees, trade/tech schools, professional certification, etc. that improve the pastor's ability to improve their income. Up to $1,000 per year, maximum $3,000.

Life Stage Grants:

- ☐ Medical assistance: assist in the retirement or avoidance of medical debt incurred by the pastor or dependents.
- ☐ Education assistance for dependents: to fund a 529 College Savings Plan or offset existing college expenses.
- ☐ Retirement savings assistance: to reward pastors who have practiced sound financial practices
- ☐ Student debt: assist in retiring student debt
- ☐ Consumer debt: assist in the retirement of consumer loans (i.e., credit cards, unsecured personal loans, vehicle loans, etc.)
- ☐ Tax debt: assist in retiring tax debts or prevent future tax debts
- ☐ Clergy relocation: unreimbursed expenses incurred in a move required by the Conference.

Emergency Grants:

- ☐ Health and Household Emergency: to offset the cost of an unexpected household event such as a job or property loss.
- ☐ Professional fees: to assist with the cost of 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:

____

____

____

____

____

____

____

____

____

____

V. Additional information

Additional information may be requested to ensure dispersed funds are used effectively. This information may include the following:

- 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).
- Credit score

VI. Privacy Policy

In the course of reviewing applications and supplying grants and services, nonpublic information about you will be collected, which is necessary to fulfill C2FM responsibilities. This information is regarded as confidential and will not be shared with anyone not 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 only disclosed to other people as required by law.

VII. Commitment

By signing 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 develop a personal financial management plan.
- You and your spouse will meet with a financial coach 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.
- Commit to financial ministry within your congregation and community. Examples of this include offering financial education programs to church members and the community, teen/youth financial 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.

II. Authorization

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

Pastor's Signature: ____ Date: ______________________

Spouse's Signature (if applicable): ____ Date: ______________________

Please mail this signed application and accompanying materials to:

Chris Bouchard, Director
Clergy and Church Financial Ministries
P.O Box 1076
Columbia, MO 65205-1076

or email it to: C*Bouchard@mumf.org*