



# Financial Leadership – Self-Select Application

[financialleadership.covchurch.org](http://financialleadership.covchurch.org)

[FinancialLeadership@covchurch.org](mailto:FinancialLeadership@covchurch.org)

## APPLICATION STEP ONE – Personal Information

Name \_\_\_\_\_

Current Mailing Address \_\_\_\_\_

Cell Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Email \_\_\_\_\_

Gender \_\_\_\_\_ Date of Birth \_\_\_\_\_ Marital Status \_\_\_\_\_

Spouse's Name \_\_\_\_\_

Will your spouse participate, also? YES NO *If "yes", please complete the information below.*

Spouse's Email \_\_\_\_\_

Spouse's Phone \_\_\_\_\_

Ages of your children \_\_\_\_\_

**Covenant Credential:** OWSa OWS<sub>e</sub> 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: \_\_\_\_\_

Average Worship Attendance: \_\_\_\_\_

Church Address: \_\_\_\_\_

Total Church Membership: \_\_\_\_\_

Role/Position (ex: Lead Pastor): \_\_\_\_\_

Church Budget: \_\_\_\_\_

Church Chair: \_\_\_\_\_ Conference: \_\_\_\_\_

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

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## APPLICATION STEP TWO – Financial Fitness Survey

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Have you completed the financial fitness survey?      Yes                  No

*If not, complete the survey here: <https://financialfitness.typeform.com/to/XiMss7>*

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## APPLICATION STEP THREE – Financial Narrative

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1. Describe how your family of origin handled financial matters. Please provide a short example.
  
  
  
  
  
  
  
  
  
  
2. In what ways has your family history given shape to your approach to finances?

## APPLICATION STEP FOUR – Supporting Information

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*Please note that all grant applications benefit in their review process by providing as much information as possible. This means the inclusion of brochures, information on what is being offered and by whom, etc. along with the application. A lack of supporting material may delay a grant response and prompt a request for additional material. If you are not filling this application out online, please attach a sheet with your responses to the following questions. Thank you.*

1. What kind of financial learning opportunity are you making a grant application for and where will it be taken?  
Will your spouse be participating?
2. How did you choose this particular offering? What is its sustaining value for you?
3. How will this learning opportunity contribute to your growth in Christ, expand your financial literacy, and/or contribute to your financial wellness?
4. Amount Requested:
5. Please provide a detailed narrative breakdown of the amount requested and how the grant resources will be used.

6. Will you or your church be contributing resources to supplement any grant monies received? If so, what is the estimated amount? (Note: Such contributions are not required, but are of interest to the initiative and helps in what we report to the Lilly Endowment).
  
7. Give an outline of how you will 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 define personal financial well-being

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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.