

**OPC Committee on Ministerial Care**  
**Financial Planning Assistance Request**

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Employer: \_\_\_\_\_

Spouse: \_\_\_\_\_ DOB: \_\_\_\_\_ Employer: \_\_\_\_\_

Contact info: phone \_\_\_\_\_ e-mail: \_\_\_\_\_ Today's Date: \_\_\_\_\_

*The Committee on Ministerial Care has a limited capacity to provide financial planning advice to OPC ministers and their spouses or widows. Our volunteer financial planners have a variety of skills. Please assist us in understanding your needs and determining which of our planners might be best equipped to help by providing the following information.*

***Please note that all information you provide will be governed by the CMC Privacy Policy.***

1. What are your primary concerns at present regarding your finances, or what major financial decisions are you facing?
  
2. How long until you hope to step down from full-time paid employment?
  
3. Are you facing any decisions within the next two years which could have major financial implications?
  
4. Which financial professionals do you currently have a relationship with OR have used in the past 5 years:

	<i>Name</i>	<i>Year last met</i>	<i>Purpose</i>
Attorney:			
Accountant:			
Life Insurance Agent:			
Financial broker/advisor:			

5. Have you:

Reviewed the resources on the CMC website (www.opcCMC.org)	Yes	No
Attended any personal finance classes (Dave Ramsey, Crown Financial, etc)?	Yes	No
Received advice from a financial planner or investment advisor regarding your current concerns?	Yes	No
Has a financial planner prepared a written formal retirement analysis for you?	Yes	No
Have you used any other resources to try to assess your situation (personal finance books, online calculators, etc.)? Describe briefly	Yes	No

6. Other relevant information:

***Please e-mail this form to: [retirement@opc.org](mailto:retirement@opc.org)***