

Financial and Retirement Evaluation (FARE) Grant Application

The Committee on Ministerial Care is partnering with Blue Trust to offer a full evaluation of a minister's finances and readiness for retirement. For more information about Blue Trust, visit: [https:// www.blustrust.com](https://www.blustrust.com)

Minister's Name: _____

Contact Phone: _____

Contact Email: _____

1. Church: _____

2. Age: _____ Planned Retirement Date: _____ Have you opted out of SS? Yes No

3. Do you have a written long-term financial plan? Yes No

4. In broad terms, how much would you estimate you have saved for retirement? _____

5. Steps in the Process:

- a. Ministers participating in the grant are asked to complete the planning process within 90 days of grant approval.
- b. The initial step is completing the personal financial inventory. This usually takes 2-4 hours but may take longer based on your family circumstances.
- c. The financial planner will meet with the minister and his wife to share the results of the review and action steps. This meeting usually lasts about two hours. A follow-up meeting may be required.
- d. Your feedback is important. Ministers are asked to provide feedback on the process to assist the CMC in assessing the benefit of the financial planning services.

6. Program Costs:

- a. The cost of providing the long-term financial plan is \$1,600. The grant provided by the CMC will cover the entire cost of the plan.
- b. Because beginning the process with Blue Trust incurs half the cost (\$800) to CMC, by signing below you are committing to completing the process.

7. All personal financial information provided and the action plan developed will be kept confidential between the minister and the financial planner.

Signature: _____

Date: _____

Please email completed application to ministerialcare@opc.org. If you have any questions, please contact John Fikkert at (641) 651-0346 or john.fikkert@opc.org.



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