Financial Assessment

The journey to ordination is a financial commitment, as well as being a spiritual and community journey. The Commission on Ministry of the Episcopal Diocese of Eastern Oregon commends these financial assessment and planning documents for your personal use. If you are married or partnered, please have your spouse/partner complete his/her own forms, as well. You may wish to use the data from these forms in your conversation with your Vestry or community of faith about their financial commitment to your journey.

YES	NO	
☐	☐	I have an updated financial plan.
☐	☐	I have analyzed my cash flow.
☐	☐	I have established a "rainy day" fund for emergencies.
☐	☐	I have completed a net worth statement. (Assets minus debts or liabilities)
☐	☐	I am saving money on a regular basis for the future.
☐	☐	I have reviewed my (life, health, disability, long term care, auto, home, liability) insurance coverage.
☐	☐	I have a national credit card in my own name.
☐	☐	I have discussed finances with appropriate family members.
☐	☐	I have documents pertaining to my personal and family finances where my family can find them (property deeds, automobile titles, wills, insurance policies, birth, investment, marriage and divorce certificates, etc.).
☐	☐	I know approximately what my financial situation would be in the event of a significant life event or change.
☐	☐	If I should die suddenly, it would be easy for my survivors to determine who should be notified.
☐	☐	If I should die suddenly, it would be easy for my survivors to understand their total financial picture.
☐	☐	I know my retirement benefits.
☐	☐	I know approximately what my Social Security income will be in retirement.
☐	☐	I know approximately the future income from my investments in retirement.
☐	☐	I have authorized another person to act on my behalf under “power of attorney” document and living will.
☐	☐	I have an up-to-date will.