

FINANCIAL PLANNING FOR THEOLOGICAL EDUCATION

Name: _____

Date: _____

On the following pages, enter descriptions in underlined fields and whole dollar amounts in shaded fields as needed. Other fields will automatically tabulate.

ESTIMATED FINANCIAL RESOURCES

	Monthly Total	Annual Total	Overall Totals	Projected Need
Income				
Student earnings				
Spouse earnings				
Guaranteed income (Social Security, VA, etc.)				
Child Support payments received				
Other (specify): _____				
Other (specify): _____				
Total Income:				
Other Assistance				
Home Church/Congregational support				
Family/Friends support				
Presbytery support				
PCUSA scholarships/loans				
Foundations or Corporations grants				
Other (specify): _____				
Other (specify): _____				
Total Other Assistance:				
Current Assets				
Cash and savings				
Investments (CDs, stocks, etc.)				
Retirement savings (IRAs, 401Ks, etc.)				
Real Estate				
Automobiles (value over any amount owed)				
Other (specify): _____				
Other (specify): _____				
Total Current Assets:				
Total Estimated Financial Resources:				

Name: _____

ESTIMATED EXPENSES

	Monthly Total	Annual Total	Overall Totals	Projected Need
Educational Expenses				
Annual tuition				
Special academic programs (CPE, intern, etc.)				
Fees				
Books				
Other (specify): _____				
Other (specify): _____				
Total Educational Expenses:				
Living Expenses				
Rent/mortgage payment				
Utilities				
Food & household supplies				
Automobile (payments, insurance, fuel, etc.)				
Telecommunications (phone, cell, online, etc.)				
Clothing				
Incidentals				
Health insurance (only "out of pocket" expense)				
Other medical/dental				
Transportation:				
Dependent allowance				
Child Care				
Child Support payments				
Life insurance premiums				
Charitable donations				
Other (specify): _____				
Other (specify): _____				
Total Living Expenses:				
Total Estimated Expenses:			_____	
Total Income less Expenses:				_____

Name: _____

OTHER INFORMATION

Indebtedness Applicant's (and spouse's or prospective spouse's) current indebtedness. Report principal amounts and related monthly payments.

Student Loans:	<i>Combine Undergrad/Grad</i>	Applicant		(Prospective) Spouse		Total Family Debt
		Balance of Principal	Monthly Payment	Balance of Principal	Monthly Payment	
	Fed. Subsidized Stafford					
	Fed. Unsubsidized Stafford					
	Federal Perkins Loans					
	PC(USA) Loans					
	Loans from parents/family					
	Other educational loans					
	Estimated future loans					
	Totals:					
Non-educational: <i>List mortgage, credit cards, etc</i>						

	Totals:					
Combined indebtedness totals:						

Assets Non-seminary scholarships (grants) for which you have applied (mark with '*') or have received.

<i>Source of Assistance</i>	Amount Fall Term	Amount Spring Term

Totals:		

I certify that the information contained on all sheets of this form is a true and accurate statement of my financial circumstances and is made in good faith.

Signature _____

Date _____