

FINANCIAL INQUIRY FORM



*For use by a Nominee in the ordination process of the Episcopal Diocese of Fond du Lac.
Bring completed form to interview with the Bishop.*

Name _____

Spouse/Partner Name _____ None

Make best estimate of values below. Please use other side to provide additional notes or information.

ASSETS *(list current value)*

LIABILITIES *(list current balance)*

| | |
|-------------------------------------|----------------------------|
| Cash _____ | Credit Cards _____ |
| CD's _____ | Car Loans _____ |
| IRAs _____ | Home Mortgage _____ |
| Pension Plan (401k, etc.) _____ | Rental Property Debt _____ |
| Real Estate – House _____ | Other Debts _____ |
| Real Estate – Rental Property _____ | Student Loans _____ |
| Real Estate – Other _____ | |
| Automobile(s) _____ | |
| Other (describe) _____ | |

TOTAL ASSETS _____ **TOTAL LIABILITIES** _____

12-month Budget *(July 1 through June 30)*

Estimated Resources

Estimated Expenses

| | |
|-------------------------------|--------------------------------|
| Earnings _____ | Tuition _____ |
| Field Work/Other _____ | Books/Supplies _____ |
| Summer _____ | Meals _____ |
| Spouse Earnings _____ | Other Food Expense _____ |
| Loan _____ | Housing / Rent _____ |
| GI Bill/Veteran Aid _____ | Utilities / Phone _____ |
| Amount from Capital _____ | Clothing / Laundry _____ |
| Available Savings _____ | Recreation _____ |
| Expected help – Parents _____ | Church Giving _____ |
| Expected help – Diocese _____ | Health Insurance _____ |
| Expected help – Parish _____ | Other Medical / Dental _____ |
| Other (please describe) _____ | Life Insurance _____ |
| _____ | Travel _____ |
| _____ | Car Payment _____ |
| _____ | Debt payment/Credit Card _____ |
| _____ | Childcare _____ |
| _____ | Other Expenses _____ |
| Total _____ | Total _____ |
| | Additional Need _____ |