



# Financial Inquiry Form

Form 4  
Last updated 7/2013

## For Those Discerning a Call to Holy Orders in the Diocese

Name: \_\_\_\_\_

Spouse/Partner's Name (if applicable): \_\_\_\_\_

Home Address: \_\_\_\_\_ City \_\_\_\_\_ St. \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: (     ) \_\_\_\_\_ Work Phone: (     ) \_\_\_\_\_

E-mail: \_\_\_\_\_@\_\_\_\_\_. \_\_\_\_\_

### Assets

Cash \_\_\_\_\_  
 CD's \_\_\_\_\_  
 IRAs \_\_\_\_\_  
 Pension Plan (401k, etc.) \_\_\_\_\_  
 Real Estate – House \_\_\_\_\_  
 Real Estate – Rental Property \_\_\_\_\_  
 Real Estate – Other \_\_\_\_\_  
 Automobile(s) \_\_\_\_\_  
 Other (please describe) \_\_\_\_\_

### Liabilities

Credit Cards \_\_\_\_\_  
 Car Loans \_\_\_\_\_  
 Home Mortgage \_\_\_\_\_  
 Rental Property Debt \_\_\_\_\_  
 Other Debts \_\_\_\_\_  
 Student Loans \_\_\_\_\_

*You may indicate later changes, as of anticipated seminary date, to figures in either column.*

Total Assets \_\_\_\_\_

Total Liabilities \_\_\_\_\_

### Budget (12 months, beginning September 1st)

#### *Estimated Resources*

Your Earnings \_\_\_\_\_  
 Field Work/Other \_\_\_\_\_  
 Summer \_\_\_\_\_  
 Spouse's Earnings \_\_\_\_\_  
 Loan \_\_\_\_\_  
 GI Bill/Veteran Aid \_\_\_\_\_  
 Amount from Capital \_\_\_\_\_  
 Available Savings \_\_\_\_\_  
 Expected help – Parents \_\_\_\_\_  
 Expected help – Diocese \_\_\_\_\_  
 Expected help – Parish \_\_\_\_\_  
 Other (please describe) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Total \_\_\_\_\_  
 Additional Needed \_\_\_\_\_

#### *Estimated Expenses*

Tuition \_\_\_\_\_  
 Books/Supplies \_\_\_\_\_  
 Seminary Board \_\_\_\_\_  
 Other Food Expenses \_\_\_\_\_  
 Room / Rent \_\_\_\_\_  
 Utilities / Phone \_\_\_\_\_  
 Clothing / Laundry \_\_\_\_\_  
 Recreation \_\_\_\_\_  
 Pledge Contributions \_\_\_\_\_  
 Health Insurance \_\_\_\_\_  
 Other Medical / Dental \_\_\_\_\_  
 Life Insurance \_\_\_\_\_  
 Travel Expenses \_\_\_\_\_  
 Car Payment \_\_\_\_\_  
 License / Insurance \_\_\_\_\_  
 Other Debts \_\_\_\_\_  
 Childcare \_\_\_\_\_  
 Other Expenses \_\_\_\_\_  
 Total \_\_\_\_\_