

Please complete and return to Kim Ingram at [kingram@wnccumc.org](mailto:kingram@wnccumc.org) or c/o WNCC Leadership Development, PO Box 2757, Huntersville, NC 28070

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Appointment \_\_\_\_\_

Base Annual Compensation \_\_\_\_\_  
*(Line 1 of Clergy Compensation Form, or base compensation reported on Extension Ministry/Appointment Beyond Local Church Form)*

Others in My Household \_\_\_\_\_

It is most convenient for me to meet with a Certified Financial Planner (CFP) in:

Asheville                      High Point                      Huntersville                      Statesville

Financial Concerns (check all that apply):

Debt:                      Student                      Medical                      Consumer/Credit

Taxes                      Budgeting                      Childcare                      Eldercare

Saving for:                      Giving

Retirement Readiness                      Other:

**Terms and Conditions of the Program**

1. The Certified Financial Planner (CFP) will ask for additional financial information, which shall remain confidential between you and the CFP.
2. Providers shall be compensated at the rate of \$100 per hour. Compensation to the CFP is the shared responsibility of the clergyperson and the WNCC, on a sliding scale based on the clergyperson's compensation (without regard to spouse employment/other sources of income), as shown in the chart below. You are expected to compensate your CFP **your portion** at each appointment. If circumstances present a difficulty in paying your portion, please initial here \_\_\_\_\_, and explain those circumstances on the reverse side of this application.

| Base Compensation  | WNCC Pays | Clergy Pays |
|--------------------|-----------|-------------|
| Less than \$55,000 | 100%      | 0%          |
| \$55,000 – 64,999  | 80%       | 20%         |
| \$65,000 – 74,999  | 60%       | 40%         |
| \$75,000 – 84,999  | 40%       | 60%         |
| \$85,000 and above | 20%       | 80%         |

**My signature conveys my consent to the Terms and Conditions of the Clergy Financial Planning Program.**

**Signed:**

**Date:**