

**Financial Coach/Consultant Report**

CDMC Financial Fortress Initiative

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Coach's Congregational Membership \_\_\_\_\_

Pastor or Church You Are Coaching \_\_\_\_\_

**Reporting Period**

\_\_ Assessment Period

\_\_ Planning Period

\_\_ Coaching Period (4 – 8 quarters)

- (1) What financial coaching, assessment and skills training has been completed.
  
  
  
  
  
  
  
  
  
  
- (2) Describe your coaching plan for the future.
  
  
  
  
  
  
  
  
  
  
- (3) Has the FFI Participant/Pastor developed a reasonable financial plan? Please summarize it.
  
  
  
  
  
  
  
  
  
  
- (4) Describe the progress or impediments to progress which is occurring with the applicant.

(5) Have you discussed maximizing tax benefits with the Participant including the implications of the FFI Award?

(6) If Participant is a church, have you discussed with church leaders (Treasurer, etc.) best practices in church finances including structuring Pastoral compensation packages etc.?

(7) Would additional resources or assistance from CDMC or others be helpful in this situation?

Please feel free to attach additional information or reports. Forward to FFI Director, Missionary Church Central District, 3282 Mallard Cove, Fort Wayne IN 46804 or [brent@CentralDistrictMC.org](mailto:brent@CentralDistrictMC.org). Thank you!

Dated \_\_\_\_\_

Coach's Signature \_\_\_\_\_

Dated \_\_\_\_\_

Pastor's Signature \_\_\_\_\_

Dated \_\_\_\_\_

Spouse's Signature \_\_\_\_\_

**Confidential Section FFI Coaches Report to District**

Please list any confidential comments or insights you have concerning your work with the Pastor and their family that the FFI Director should be aware of:

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**REIMBURSEMENTS**

I am donating my time and expenses to the Financial Fortress Initiative.

I am listing my expenses below and request reimbursement from the FFI Fund.

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**Dated** \_\_\_\_\_

**Coach's Signature** \_\_\_\_\_