



Financial History

Date: _____

Participant's Name (please print): _____

1. A national survey indicated that the average American family has a total of \$5,800 of debt, not including home mortgages or vehicle loans. Which of the following is the closest to your family:

Check one:

- My family is at or above the national average. (Explain on the back.)
- My family is slightly below the national average.
- My family is significantly below the national average.
- My family is debt free (other than our mortgage and/or vehicle loans).

2. We/I manage our finances by the following method:

Check one:

- We/I have an established budget.
- We/I have a general idea of my income and expenses, but no formal budget.
- We/I basically live from paycheck to paycheck.
- Our/My income falls short sometimes and I am accumulating more debt.

3. What do you believe about tithing?

4. What is your financial plan for retirement?

Please return completed form to: SHAPE Indiana
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