

International Students Inc.
Financial Responsibility Checklist

Confidential Information

Personal information is a sensitive topic with most people. ISI follows strict professional guidelines regarding access to all personnel information. All personnel information is private and only available to interviewers and supervisors on a “need to know” basis. As representatives of Christ, ISI is committed to the highest standards of professionalism in personnel matters.

While some of these questions may appear somewhat invasive, part of evaluating your potential ability to raise support, and to live on it, requires a comprehensive look at your financial health.

Please answer these questions fully and honestly. There is no judgment attached to any of this information.

Name _____ Date _____

Budget

Do you use a family budget? Yes No Sometimes

Do you keep to that budget? Yes No Sometimes

If you don't use a budget, or have trouble sticking to that budget, why? _____

Income

What is your current annual salary? \$ _____

What was your individual total income last year? \$ _____

Do you have other sources of family income? Describe from where and how much annually. _____

Complete the following table related to your current debt-load. Again, please be honest and include all debt.

Total Debt Amount	Source	Approximate Monthly Payment	Approximate Payoff Date
\$	Home	\$	
\$	Auto(s)	\$	
\$	Credit Cards	\$	
\$	Institutional & Insurance Loans	\$	
\$	Loans from Family Members	\$	
\$	Other/Misc. borrowing	\$	

Life Insurance

Please indicate the approximate pay-out amounts of each type of insurance you currently carry.

Type of Insurance	Father	Mother	Children
Term Life Insurance			
Whole Life Insurance			
Disability Insurance			
Accidental Death & Dis.			
Cash Policy Insurance			
Other			

Medical Insurance

	Father	Mother	Children
Carrier			
Deductible			
Co-Pay			
Maximum Annual out of Pocket			
Lifetime Maximum Coverage			

Savings, Investments, and Retirement

Have you ever met with a financial investment or retirement planner to make a plan for your future? **Yes No**

If yes, who/when? _____ Date of last revision of your plan? _____

Are you currently saving for retirement? **Yes No** Amount savings per year set aside? _____

Total amount in your retirement fund(s)? _____

Total amount of other investments? _____

Will

Do you have a valid will in your state? **Yes No** When was it last revised or updated? _____