

**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.

<b>Total Debt Amount</b>	<b>Source</b>	<b>Approximate Monthly Payment</b>	<b>Approximate Payoff Date</b>
\$	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? \_\_\_\_\_