

Clergy Wellness Benchmark Report

Financial Wellness

#1

SPENDING/ SAVING PLAN

- Monthly Budget
- Generous Giving
- Established Emergency Fund
(3-6 months expenses)
- Debt-Free *(Except mortgage)*

#2

RETIREMENT READINESS

- Retirement Goals
- 15% of Income Directed
to Retirement Plan
- Plan for 85%
of Present
Income in
Retirement

#3

CLERGY FINANCIAL LITERACY

- Consult with Financial Advisor
Annually *(i.e. Ernst & Young)*
- Knowledge of Clergy Taxes
- Knowledge of Housing Allowance
- Complete A Financial Wellness
Education Program *(i.e. Financial
Peace University)*

