

FINANCIAL AID REQUEST (ORDAINED CLERGY)

Name: _____ Telephone (day): _____
 Address: _____ Telephone (eve): _____
 _____ Email: _____
 Single: _____ Married/Partnered (include spouse in finances): _____
 Number and ages of dependents _____ Spouse/Partner's Employment _____
 Ministry in which you are now or have provided services as an ordained priest:

Canonical residence: DioCal DioSJ

ASSETS		LIABILITY	
Cash Balance	\$ _____	Mortgages	\$ _____
Stocks/Bonds	\$ _____	Car Loan Balance	\$ _____
401k/IRAs	\$ _____	Credit Card Balance	\$ _____
Pension Balance	\$ _____	Student Loan Balance	\$ _____
Real Estate Owned	\$ _____	Taxes Payable (include IRS	
Other Assets	\$ _____	form 1040)	\$ _____
	\$ _____	Other Liabilities	\$ _____
Total Assets	\$ _____	Total Liabilities	\$ _____
MONTHLY INCOME		MONTHLY EXPENSES	
Clergy Income	\$ _____	Housing Expense (rent)	\$ _____
Housing Allowance	\$ _____	(mortgage)	\$ _____
Family/Partner Income	\$ _____	Real Estate taxes	\$ _____
Interest/Dividends	\$ _____	House Insurance	\$ _____
Rental Property	\$ _____	Car Payments	\$ _____
Other Sources	\$ _____	Student Loan Payments	\$ _____
	\$ _____	Revolving Debt Payments	\$ _____
Total Monthly Income	\$ _____	Other Contractual Payments	\$ _____
		General Living Expenses	\$ _____
		Childcare Expenses	\$ _____
		Total Monthly Expenses	\$ _____
PREVIOUS SCHOLARSHIP GRANTS RECEIVED		PREVIOUS FINANCIAL AID RECEIVED SINCE ORDINATION	
Year	_____	Year	_____
Year	_____	Year	_____
Year	_____	Year	_____
Total	_____	Total	_____
		(NUMBER OF GRANTS LIMITED TO 5)	

Amount of Financial Aid Requested From the Diocese: \$ _____

Signed : _____ Date: _____



Diocese of California ■ The Episcopal Church
 ATTN: SCHOLARSHIP
 1055 Taylor Street ■ San Francisco, CA 94108
 www.diocal.org ■ 415.673.5015
 scholarship@diocal.org

*****APPLICATION MUST NOT BE FAXED*****

On a separate pages, please:

1. **List** titles, dates and hours of continuing education conferences, seminars or classes you have attended in the last three years.
2. **Describe** in detail your plan for the required 52 hours of theological study in the 12 months following receipt of any stipend awarded.
3. **Attach** copies of documents in support of income and debt entries contained in this application. Include a copy of a loan coupon(s)* with account or loan number, name and address of the loan maker.

* All awards made for repayment of Student Loans will be made directly to the loan maker as indicated on this coupon.

The moneys available for this financial aid request are based on income derived only from the **Eastman Education Fund**. Only the interest earned may be used; the principal of this fund must be maintained. Therefore, total amounts available for distribution are dependent on the economy and may not allow us to completely satisfy all requests despite our sincere desire to do so. To equitably proportion the awards we have established a system that takes into consideration several factors taken from this application form:

- Total scholastic loan balance remaining;
- Repayment burden for scholastic loan (ratio of payments to income);
- Total family or partnership income;
- Continuing education both past and planned;
- Previous scholastic financial aid and post ordination aid received.

The relative weight each of the above criteria is given is determined by the Scholarship Committee when convened and applied equally to all applications. Therefore, all requested information must be completed to insure fair distribution of the available funds.

Due to increased demand on more limited funds, applicants are limited to 5 granting cycles after ordination.

Eastman Education Fund

The purpose of this trust is to provide financial assistance on an annual basis to worthy applicants for the study of Theology, which shall be known as stipends. The Bishop and the Standing Committee shall be the Trustees of the Fund and are charged with its administration and the selection of stipend recipients. The Trustees shall include the following criteria in their selection process of worthy stipend recipients:

1. The recipient must be a regularly enrolled student in a theological seminary or other prescribed theological program, who has demonstrated a need for financial assistance; or
2. a. The recipient must demonstrate service in a recognized ministry of the Episcopal church; and
b. Demonstrate a commitment to continuing theological study by having completed a satisfactory number of hours (40) of continuing education after graduating from a theological seminary or other prescribed theological program; and
c. commit that, for the 12 months following receipt of a stipend from this Fund, he/she will devote a satisfactory number of hours(52) to the study of theology; and
d. has outstanding student loans as a result of previous dedication to theological study in preparation for service in a recognized ministry of the Episcopal Church

CDSP Scholarships

Monteagle Scholarship: Established by the Will of Lydia Monteagle, the funds were distributed in trust, the income from which was distributed to CDSP for the purpose of establishing and maintaining in its school two scholarships to be called "The Monteagle Scholarship" to be allotted from time to time under the direction of the Bishop.

CDSP Elocution: Established by the Will of Lydia Monteagle, held in trust by the Diocesan Corporation. Principal to be invested and income only used for two scholarships to CDSP, under the direction of the Bishop

Turtle Fund: To be used exclusively for the training of and benefit of students for Holy Orders in the Protestant Episcopal Church

Politzer Fund Under will of Augusta Politzer to the Diocesan Corporation with the request that her son, the Rev. Jerome F. Politzer be consulted as to its use. In 1977 the Rev. Politzer agreed to the suggestion that the fund be used to supplement scholarship funds for seminarians. It was suggested that accumulated income and annual income be used for unusual and extraordinary situations where other seminarian scholarship funds could not be used and that principal might be used on a refundable grant basis as a revolving loan fund for seminarians.



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