Project Name: Brite Divinity School Lilly Endowment Project on Financial Well-Being

Key Objectives:

 To provide pertinent information about the financial well-being of students and graduates

To educate various constituencies about the costs of theological education and to increase financial literacy among our students and graduates

To expand partnerships with key institutions and judicatories

To develop sustainable and systemic interventions and practices for the future

Activities to date:

 Project Manager hired

 Applications for Research Assistant under review

 Student workshop on clergy taxes scheduled for March 27

 Student workshop on negotiating salary packages scheduled for April 17

Initial site plan for online financial literacy and financial planning support developed; back-end page development underway

 Checklist of data to be solicited from students and graduates drafted

Met with representative of National Association of Church Business Administration to explore possible collaborations

Resources discovered:

 Auburn Center for the Study of Theological Education – Resources for Student Financial Planning

Australian Securities and Investments Commission, Report 229: National financial literacy strategy

Finra Investor Education Foundation: National Financial Capability Study

National Association of Church Business Administration

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