**George W. Truett Theological Seminary’s**

**Financial Wellness Program**

1. *Key Objectives*: Truett Seminary’s key objective is to address economic challenges facing future ministers by offering practical and affordable financial education for our current students and alumni, as well as to local ministers. We are creating a Financial Wellness Program that includes three goals: to host an annual “New Minister Financial Wellness Conference” for our seminary students and alumni each year, to host three financial wellness workshops per year for our current seminary students, and to provide on-going financial counseling for our students.
2. *Most Important Resources to Date*:
	1. We have set the dates for two of our upcoming events. We will host our first workshop on September 29th, 2014. This workshop, entitled, “Compensation Planning: from Start to Finish—A Complete Review” features Elaine Sommerville of Sommerville and Associates, P.C. We will host our first conference on January 22-23rd, 2015 featuring Robert Moon of the Heritage Financial, LLC group.
	2. We have established contact with key partners who will offer expert experience and education outside the classroom to our students. We have established contact with 6 additional experts or groups who have stated an interest in teaching a workshop or conference for Truett’s Financial Wellness Program.

*Project Director*: Jo Ann Sharkey, Assistant Director of Student Services at Truett Theological Seminary, Baylor University

Email: JoAnn\_Sharkey@baylor.edu

Phone: 254-710-6084 or 1-800-BAYLOR-U, option 5