PRESENTED BY THE **PATHWAYS TO VITALITY INITIATIVE**

Free Personal Financial Planning for Clergy

The Pathways to Vitality Initiative is happy to announce that personal financial planning is now available for active clergy (stipendiary and non-stipendiary) free of charge. The purpose of personal financial planning is to develop a deeper understanding of your financial wellbeing while developing a customized plan with practical tactics for achieving financial health.

To qualify for this unique benefit, you are asked to make the following commitments.

- **ATTEND** a minimum of three meetings during the course of 12 months with the diocese's certified financial advisor in Indianapolis prior to December 31, 2018
- **PARTICIPATE** in all three meetings with your spouse/partner
- **BE WILLING** to do the necessary homework prior to each meeting including the development of a comprehensive household budget
- **IMPLEMENT** your financial plan upon completion of your work with the financial advisor

LISA BROWN, CPA AND MBA

Certified Financial Advisor

Lisa is a financial advisor at Highfield & Associates in Indianapolis where she specializes in budgeting/cash flow management, retirement planning strategies, estate planning strategies and investments. She currently provides financial advisory services to the Ministerial Excellence Fund Grant Committee and personally meets with our applicants to assist them in developing customized financial wellness strategies. Lisa is a member of Trinity Episcopal Church in Indianapolis.

A limited number of slots are available for this free service and will be allocated on a first come; first served basis.
To reserve your slot, please contact Melissa Hickman, Program Director, Pathways to Vitality Initiative at **melissa.e.hickman@gmail.com** Only email reservations will be accepted.

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Pathways to Vitality

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