

Leader's Guide

An Intensive Weekend Retreat on Personal Finances for Pastors and Spouses

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Appendix A: Sample Retreat Invitation

Dear Pastor Heidi,

Our district is hosting a COMPASS True North Retreat at our district campground on July 24-26, 2020. This is a weekend for a pastor and spouse to work on their personal finances together, gain practical skills, and develop a financial plan to follow. The focus is on budgeting and debt reduction. This retreat has proven to be transformational for pastors' finances as well as their marriages.

The event expenses (materials, coaches, meals, and housing) are all covered by the district, so the only expenses for you would be the travel cost to and from the campground. For more information about the True North Retreat, visit *compassinitiative.org/compass-true-north-retreat*.

To register for the retreat, please visit the COMPASS Initiative website and complete the True North Retreat Registration. In addition to the registration form, please read, sign, and email the attached True North Retreat Covenant to *districtoffice@district.org*. You will receive a packet of materials and instructions one month prior to the event. This packet will contain the pre-retreat assignments and materials that you will need to bring to the retreat in July.

If you have any questions, please feel free to call me at my number below. I hope you and your spouse will consider attending this True North Retreat.

Sincerely,
District COMPASS True North Retreat Coordinator

Appendix B: TNR Participant Covenant



Participant Covenant Agreement

The True North Retreat is an opportunity for ministers and spouses to experience personal financial transformation and to be equipped to serve as models for other ministry households. This intervention retreat includes financial training exercises, challenges, and encouragement, followed by a one-year accountability commitment within a peer cohort.

Recognizing the financial and personnel resources being invested in me personally and as a minister, I commit to the following statements of covenantal agreement:

- I will immediately apply for the COMPASS Journey online at *compassinitiative.org*.
- If married, my spouse will attend the retreat with me and I/we will both commit to attending all sessions during the weekend.
- I/we will commit to faithfully logging everything I/we spend in the "30 Day Spending Notebook."
- I/we will bring to the retreat all financial information outlined in the "Personal Budget Information."
- I/we will agree to join an accountability cohort of peers also attending the retreat and connect at least monthly for one year.
- I/we will complete a Personal Financial Plan during the retreat and commit to following the plan for at least a year.
- I/we will complete a Debt Freedom Plan during the retreat and commit to following the plan for at least a year.
- I/we agree to share a brief written report of the retreat experience with my district superintendent.

Minister's Printed Name	Minister's Signature	Date
Spouse's Printed Name	Spouse's Signature	 Date

Appendix C: Participant Registration Form



Participant Registration Form

Nai	lame:		
Add	ddress:		
Cit	iity: Sta	ate/Province:	Zip/Postal Code:
Em	mail:		
Pho	hone:		
Age	ge:		
Dis	oistrict:		
Chu	hurch Name:		
Spc	pouse's Name:		
Ch	Check all of the following statements t	that apply to you.	
	You have more than \$10,000 USD/\$ educational debt remaining.	513,000 CAD in combined (including your spouse's)
	You have more than \$10,000 USD/\$ or children.	613,000 CAD in "family part	ticipation" student loans for a child
	You have not signed up for a US Naz	arene Fidelity 403(b) accou	nt/Canadian RRSP account.
	You have not contributed to a US Na the past three years.	nzarene Fidelity 403(b) acco	ount/Canadian RRSP account for
	You live in a parsonage or rental, and	l you have no other housing	investments.
	You have less than 3% of your annua	l household income in non-ı	retirement savings.
	You have delayed medical treatment	for yourself, spouse, or chil	d due to financial stress.
	You do not have medical insurance.		

Appendix C: Participant Registration Form

A	
Annual contribution to US Nazarene 403(b) account/Canadian RRSP:	
Annual contribution to "other" retirement accounts:	
Current total retirement savings:	
Current total NON-retirement savings:	
Percentage of annual income currently in NON-retirement savings:	
Debt	
Household debt ratio (total monthly debt payments / gross monthly income) x 100:	
Total educational debt (combined household educational debts):	
Total NON-educational debt (Do NOT include mortgages.):	
Housing	
Do you live in a church provided parsonage? ☐ Yes ☐ No	
Do you receive a housing allowance from the church? \Box Yes \Box No	
Do you own the home in which you live? ☐ Yes ☐ No	
If "Yes," what is the estimated equity in your home?	
Do you own any other houses or property? ☐ Yes ☐ No	
If "Yes," what is the estimated equity?	

Appendix C: Participant Registration Form

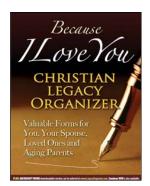
LIST AII THE WIN	dergraduate and graduate courses in business or finance that you have completed.
List all the cor completed.	ntinuing education courses and seminars in business or finance that you have
Church Finan	res
	atio (Annual rent or mortgage payments/church's annual income) x 100:
Has the churc □ Yes □ N	h paid 100% of its denominational allocations for the past three years? No
lf "No," please	list the reasons and the percentage that was paid.
What biblical	financial stewardship classes does the church offer?

Appendix D: Pre-Retreat Instruction Letter

Dear Pastor Heidi,
The COMPASS True North Retreat is only a month away, and we are glad that you have decided to attend. We believe the retreat will be a transformational experience for you, your family, and your ministry.
Enclosed, you should find one copy of the Christian Legacy Organizer and two copies of the 30-Day Spending Tracker. It is important for you to complete the following assignments before you leave home for the retreat.
1. In the Christian Legacy Organizer, complete pages 13 through 18:
 □ List of Accounts (p. 13) □ Income Sources (p. 14) □ Lifestyle Expenses (p. 15) □ Liabilities & Debts (p. 16) □ Assets & Possessions (p. 17) □ Christian and Charitable Giving (p. 18)
2. Using the 30-Day Spending Tracker , immediately begin tracking your daily spending. Write down every penny you spend between now and the retreat. You and your spouse should separately track your own individual spending. Monthly bills should be included in only one of your 30 Day Spending Trackers.
 Note the date and the amount you spend. Note the item or description of the expense. Include a general category for your spending. Also, note how the purchase was made (cash, credit, debit, check).
Be sure to bring your completed Christian Legacy Organizer (pp. 13-18) and both 30-Day Spending Trackers with you to the True North Retreat.
The retreat will be held on our district campground, July 24-26, and we will begin at 6:00 pm Friday night with dinner and conclude at 1:30 pm Sunday afternoon. Childcare is NOT provided, so please plan accordingly.
As a reminder, the district is covering all the costs for your materials, housing, and meals. We look forward to seeing you at the retreat. Please feel free to contact me if you have any further questions.
Sincerely, District COMPASS True North Retreat Coordinator

Appendix E: Pre-Retreat Assignments

Christian Legacy Organizer





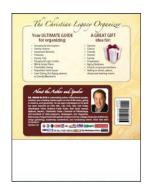












30-Day Spending Tracker











Appendix N: Sample Media Release Form

Consent, Waiver and Release	
,	, grant to the Church of the Nazarene, Inc.,
a Missouri nonprofit corporation, and its employe	ees, officers, agents and assigns (hereinafter
referred to as "Nazarene Church"), the right to us	se, reproduce, adopt, distribute, and publish
photographs, video, audio or related content ("Co	ontent") taken by the Nazarene Church on
,20	, or that I have taken independently and
oluntarily submitted to Nazarene Church for use	e by any of the ministries of the Nazarene Church
or purposes of informing and promoting the wor	k of the Nazarene Church and it's ministries.
understand and agree that the Content(s) may b	be the used in whole or in part, at any time, in
composite or distorted form, in color or otherwise	, , ,
ncluding, but not limited to, printed medium, vide	eo, and/or on the Internet.
l waive any right to inspect or approve any finishe Content.	ed product, advertising or other copy that uses the
I agree to indemnify Nazarene Church from and a expenses and reasonable legal fees, incurred by N invasion of privacy or trespass created in the taking to indemnify Nazarene Church for any such amous representation, or warranty of this agreement.	ng or publication of the Content(s). I also agree
l understand that the terms herein are contractual legally binding, and that I have voluntarily signed	
I HAVE FULLY INFORMED MYSELF OF THE CO RELEASE BY READING IT BEFORE SIGNING IT	
Ву	Printed Name
Address	City/State/Zip