

Congregation B'nai Shalom Adjustment Application Form

Applicant's name: _____ Spouse/Partner's name: _____

Address: _____

Phone number: _____ Email address: _____

of Dependent Children: _____ # of children in Religious School: _____

Employment:

Member's employer: _____ Full time Part time

Spouse/Partner's employer: _____ Full time Part time

I am /We are applying for an adjustment on my/our Annual Membership Commitment and confirming to the congregation that I/we cannot afford to pay the full expected Annual Membership Commitment because of the following:

1. _____ Unemployment/Less than full employment: Self Spouse Both
2. _____ Extraordinary expenses (for example: medical, caring for parents, etc.)
3. _____ Insufficient income

Total Family Annual Gross Income including salary, investments, annuities, social security, etc.

\$ _____ per year

Please provide a brief explanation of the issues noted above:

Total financial obligation to B'nai Shalom (include dues, religious school and any applicable fees) as shown on your annual statement:

\$ _____

What is the **amount** that you are proposing to pay (URJ guidelines suggest at least 2% of annual gross income, adjusted for extraordinary expenses). Remember that **B'nai Mitzvah and trip fees cannot be adjusted:**

\$ _____ per year or \$ _____ per month (based on a full year)

I understand that I will be contacted if additional information is needed to help process my application.

So affirmed, signed: _____ Date: _____

_____ Date: _____

Please provide any additional explanation on a separate piece of paper.

Annual Membership Commitment Adjustment Program

Our adjustment process is guided by the following principles:

1. Consistent with Jewish principles regarding tzedakah, every congregant is expected to support our community both financially and spiritually.
2. We strive to treat every member with respect.
3. We seek to minimize any personal discomfort while ensuring an equitable distribution of responsibility for the finances of Congregation B'nai Shalom.
4. We recognize that granting adjustment to one member means that we increase the burden on fellow members to cover the difference.
5. We understand that there are significant costs associated with living in our community. While many members of the congregation are contributing in excess of 2.0% of total household income to support Congregation B'nai Shalom, we also understand that families with lower incomes or with extraordinary medical or other expenses may not be able to afford this level of support.
6. We are committed to prudent fiscal management of our congregation's finances.
7. Building Assessment is deferred before determining any adjustment. We do not offer adjustment on Building Assessment (\$3000 paid over 6 years starting in year two of membership); however, we will offer alternative payment options including deferment and extending payment over more than 6 years.
8. **We do not offer adjustment on fees such as B'nai Mitzvah fee and school trip fees.**

Important Note Regarding Expectations And Consequences:

Our goal is to avoid any difficult or embarrassing situations for you or your family. In this spirit, we want you to be aware that only members-in-good-standing have the following privileges in our congregation:

- To enroll your child(ren) in religious school or have them assigned to a class
- The ability to use our clergy and/or our facilities for life-cycle events
- To receive High Holiday seating cards for your immediate family at no extra cost
- To participate in congregational programming at member rates

Adjustment Application Directions

To process your adjustment request and for you to be a member-in-good-standing you must:

1. Complete your annual membership commitment statement, choosing an approved payment plan.
2. Submit statement, supporting documentation and Adjustment Application form,
3. Reach an agreement with the Adjustment Committee regarding your obligation for the coming fiscal year.