

Clergy Worksheet

Check all questions and **provide documentation** for all questions answered 'Yes'.

Income & Retirement

Yes No

- W-2 Income Provide W-2.
- Do you have any income from Weddings, Funerals, Etc. Amount \$ _____
- Do you have an approved exemption from the IRS from self-employment tax?
- Did you have retirement income designated to housing allowance? Amount \$ _____

Parsonage & Allowances

- Did you receive parsonage provided by the church? Fair Market Value \$ _____
- Did you receive a housing allowance? Amount \$ _____
- Did you receive additional utilities allowance? Amount \$ _____
- What is the Fair Rental Value of your home? Fair Market Value \$ _____
- Did you rent your home? Annual Rent Paid \$ _____

Parsonage Expenses

- | | |
|---------------------------|----------|
| Insurance | \$ _____ |
| Mortgage Payments - Total | \$ _____ |
| Real Estate Taxes | \$ _____ |
| Repairs & Maintenance | \$ _____ |
| Home Furnishings | \$ _____ |
| Association Dues | \$ _____ |
| Utilities: | |
| Electricity | \$ _____ |
| Gas / Oil | \$ _____ |
| Water / Sewer | \$ _____ |
| Trash | \$ _____ |
| Cable / Internet | \$ _____ |
| Telephone | \$ _____ |
| Miscellaneous: | |
| _____ | \$ _____ |
| _____ | \$ _____ |

Professional Expenses (List only those that you have not been reimbursed for)

- | | |
|--|----------|
| Books, Dues & Professional Subscriptions | \$ _____ |
| Cell Phone (only % used for business) | \$ _____ |
| Continuing Education | \$ _____ |
| Meals | \$ _____ |
| Supplies | \$ _____ |
| Travel | \$ _____ |
| Vehicle Expense | |
| Business Miles | _____ |
| Parking & Tolls | \$ _____ |