

CLERGY WORKSHEET

HOUSING ALLOWANCE

FMV of Purchased Home _____

YEAR-TO-DATE TOTALS _____

1. Rent _____

2. Mortgage Payment _____

Principal _____

Interest _____

3. Real Estate Tax _____

4. Insurance _____

5. Repairs–Maintenance–Upkeep _____

6. Furniture & Appliances _____

7. Decorator Items _____

8. Utilities _____

Heating Fuel _____

Electricity _____

Phone-Cell _____

Cable – Dish – Internet _____

Water & Sewer _____

Trash Removal _____

9. Lawn Care & Landscaping _____

10. Cleaning Supplies _____

11. Association or Condo Fees _____

12. Tools, Hoses, Cords _____

13. Flooring & Windows _____

14. Holiday Decorations _____

15. Snow Removal _____

16. Outdoor Eqpt & Structures _____

17. Security _____

18. Miscellaneous _____

TOTAL HOUSING COSTS _____

AMOUNT DESIGNATED _____

Not Allowed: Food, toiletries, clothing, domestic servants, paper products, hobby or entertainment expenses and home equity loans not used for housing-related purposes.

MISCELLANEOUS INFORMATION

Exempt from Social Security? YES NO

Copy of Approved Form 4361 YES NO

Parsonage Provided YES NO

Value of Parsonage \$ _____

Honoraria Received \$ _____

FICA Supplement/Wages not on form \$ _____

Non-Accountable Auto Allowance \$ _____

Non-Accountable Book Allowance \$ _____

CLERGY PROFESSIONAL EXPENSES

Books, Materials, Journals _____

Gifts to Parishioners _____

Supplies, Home Office Expenses _____

Special Clergy Garb _____

Tolls, Parking, Non-auto Travel _____

Entertainment & Business Meals _____

Overnight Travel & Lodging _____

Conferences, Seminars, Education _____

Dues, Liability Insurance _____

Hospitality _____

_____ Meals @ \$ _____

_____ Snacks @ \$ _____

Non-Commuting Auto Expense _____

_____ Miles @ _____¢

TOTAL PROFESSIONAL EXPENSES _____

NOTES:

