

# 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: