

# CLERGY WORKSHEET

## HOUSING ALLOWANCE

FMV of Purchased Home \_\_\_\_\_

### YEAR-TO-DATE TOTALS

1. Rent \_\_\_\_\_

2. Mtgage Pmt \_\_\_\_\_

Principal \_\_\_\_\_

Interest \_\_\_\_\_

3. Realty Tax \_\_\_\_\_

4. Insurance \_\_\_\_\_

5. Repairs – Maintenance – Upkeep \_\_\_\_\_

6. Furniture & Appliance Purchases \_\_\_\_\_

7. Decorator Items \_\_\_\_\_

8. Utilities \_\_\_\_\_

Heating Fuel \_\_\_\_\_

Electricity \_\_\_\_\_

Phone \_\_\_\_\_

Cable or DISH TV - Internet \_\_\_\_\_

Water & Sewer \_\_\_\_\_

Trash Removal \_\_\_\_\_

9. Lawn Care & Landscaping \_\_\_\_\_

10. Cleaning supplies – carpet cleaning \_\_\_\_\_

11. Association or Condo Fees \_\_\_\_\_

12. Tools, hoses, cords \_\_\_\_\_

13. Flooring – Window treatments \_\_\_\_\_

14. Holiday decorations \_\_\_\_\_

15. Snow Removal \_\_\_\_\_

16. Miscellaneous \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

TOTAL HOUSING COSTS \_\_\_\_\_

AMOUNT DESIGNATED \_\_\_\_\_

*Not allowed: Food, toiletries, clothing, maid or gardener, paper products, hobby or entertainment expense and home equity loans not used for housing-related purposes.*

## SOCIAL SECURITY BASE

FORM 4361 Exclusion YES  NO

Clergy Wages Reported on W-2 \_\_\_\_\_

Wages from Form 1099 MISC \_\_\_\_\_

Wages Not on Form \_\_\_\_\_

FICA Supplement \_\_\_\_\_

Allowances (Not Accountable) \_\_\_\_\_

Honoraria \_\_\_\_\_

Value of Parsonage \_\_\_\_\_

Amount of Housing Allowance \_\_\_\_\_

TOTAL COMPENSATION \_\_\_\_\_

Moving Exp. Reimbursements \_\_\_\_\_

## CLERGY PROFESSIONAL EXPENSES

Books, materials \_\_\_\_\_

Gifts \_\_\_\_\_

Supplies \_\_\_\_\_

Special Clergy Garb \_\_\_\_\_

Tolls, non-auto travel, parking \_\_\_\_\_

Entertainment, Business Meals \_\_\_\_\_

Overnight Travel & Lodging \_\_\_\_\_

Conferences, Seminars, Educ. \_\_\_\_\_

Hospitality \_\_\_\_\_

\_\_\_\_\_ Meals @ \$ \_\_\_\_\_

\_\_\_\_\_ Snacks @ \$ \_\_\_\_\_

Auto Expense (non-commuting) \_\_\_\_\_

\_\_\_\_\_ Miles @ \_\_\_\_\_¢ \_\_\_\_\_

TOTAL PROFESSIONAL EXPENSES \_\_\_\_\_