

Items listed on this worksheet in either section must be paid by you or your spouse and you must keep receipts for expenses for a minimum of 5 years after you file your taxes.

Ministers Income/Deduction Worksheet

Client Name _____ **Tax Year** _____

Put total money received from weddings, funerals, and events like baptisms _____
(Above includes tips, honorariums, gifts, and love offerings)

Expenses: (Directly related to above monies received) (Must have receipts or records)

Certificate Expense _____

Teaching Expense _____

Auto Expense – (Must list vehicle make, model, and year (broken down by vehicle)

Vehicle Make - _____

Vehicle Model _____

Vehicle Year - _____

Total miles on vehicle (Only for tax year) _____

Business Miles (Only for tax year) _____

Business miles are only for those that are directly related to above income and that have not been reimbursed)

Other Expenses (list with totals) _____

Housing Allowance Worksheet

Housing Questions:

Does the church provide you a parsonage (Yes or No)? _____

If not, do you own or rent your home? _____ (Indicate which one)

(If you live with someone else and they pay bills, you do not qualify for housing allowance)

For Everyone:

Fair Rental Value of Home / Parsonage (This is required) _____

(Take monthly fair rental value x 12 for above answer)

Utilities **total** (that you paid in year) (cell phones do not qualify) _____

Items listed on this worksheet in either section must be paid by you or your spouse and you must keep receipts for expenses for a minimum of 5 years after you file your taxes.

If you rent your home:

The total housing allowance the church gave you for the year _____

The utility allowance (if separate) the church gave you for the year _____

The rent you paid for the year _____

The renter's insurance amount you paid for the year _____

If you own your home:

The total housing allowance the church gave you for the year _____

The utility allowance (if separate) the church gave you for the year _____

If you have a mortgage put your monthly mortgage amount (Include Form 1098) _____
(The above does not include HLOC or home equity loans)

Home Equity Loans Do Not Normally Qualify

If you have home equity loans, what is the total of the loan amount _____

How much of that amount was used for construction improvements of your primary home? _____

How much is the monthly payment on that loan? _____

Real estate taxes on your house (if not listed on 1098 mortgage statement) _____

Home owner's insurance (Do not list if in mortgage payment) _____

Repair Expense _____

HOA fees _____

For both renters & if you own your home (not if owned by church as parsonage):

Yard work expense (must have paid it to others (not kids), example a company) _____

Furnishings and appliances (purchase & repair) _____

Maintenance items (cleaning supplies, light bulbs, pest control, etc.) _____

Unreimbursed Employee Business Expenses:

Total miles on vehicle (Only for tax year) _____

Employee Business Miles (Only for tax year, not to/from work) _____

List total, except milage, unreimbursed business expenses by category with totals.
