

Clergy Information

	Position Title:	
	<u>Ordained, Licensed or equivalent (circle one)</u>	
	Please provide copy of your compensation package.	
	<u>Questions;</u>	
1	Are you exempt from paying social security? If Yes send copy of Form 4361	YES OR NO
2	Have you adequately accounted to your employer and been reimbursed for your professional expenses? If NO, show expenses below on #5	YES OR NO
3	To the best of your knowledge, is your W2 prepared correctly? If No, what is incorrect?	YES OR NO
4	Did you receive any gifts, bonuses, and allowances (other than parsonage allowance) from your employer that was not included as taxable on your W2?	YES OR NO
4.1	Amount of Gifts and Bonus from your church not on W2. This is taxable. Note: gifts from individuals are not taxable.	
4.2	Amount of other allowances not on W2	
4.3	Amount of Funerals and Wedding Fees paid directly to you	
4.4	Direct expenses for Funerals and Weddings Fees above	
4.5	Direct mileage for Funerals and Weddings above	
5	How much do you receive each payday?	
5.1	How often are you paid?	
6	Parsonage Information:	
6.1	Was the parsonage amount official designated in advance?	YES OR NO
6.2	IF yes how much?	
6.3	If employer provided parsonage, what is the rental value?	
6.4	If you own, Current FMV	
6.5	Date occupied	
6.6	Location, City and State	
7	Parsonage Expenses paid by you:	
7.1	Rent Paid	
7.2	Principial / Interest paid on Mortgage	
7.3	Taxes	
7.4	Insurance	
7.5	Repairs / Upkeep	
7.6	Furniture and Appliances	
7.7	Decorator Items	
7.8	Utilities	
7.9	Miscellaneous supplies	
8	Unreimbured Expenses:	
8.1	Travel Local: Parking/Tolls/Fares	
8.2	Travel Away from Home: Auto rental/ lodging/ etc	
8.3	Meals	
8.4	Entertainment	
8.5	Education Expenses	
8.6	Office supplies and postage	
8.7	Religious Materials	
8.8	Seminars and Dues	
8.9	Subscriptions	
8.95	Other expenses:	
8.96	New or Used Equipment or Professional Library Purchases:	
	<u>Date Purchased</u> <u>Description</u>	<u>Amount</u>