

2020 Minister Tax Worksheet

For: _____

(Minister please fill this out & we will discuss it)

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Social Security

Have you filed IRS Form 4361 to opt out of Social Security on ministerial earnings? YES NO

Date(s) you were licensed _____, ordained _____, and/or commissioned _____

Provide month and year

Housing Allowance

How much were you paid as Housing Allowance in 2020? \$ _____

How much did you spend on your residence in 2020? \$ _____

(Provide a \$ total. We will review your categorized list of expenditures if you desire, and can discuss.)

Does the church council pre-approve your housing allowance each year? YES NO

(Employer should pass a resolution and/or make it a budget line item)

For homeowners:

What is the estimated ANNUAL FAIR RENTAL VALUE of your home, as furnished, including utilities?

\$ _____ (your Housing Allowance exclusion cannot exceed this amount) *let's discuss as needed*

OR; if you live in a parsonage:

What is the estimated ANNUAL FAIR RENTAL VALUE of the home, as is? \$ _____

What home items does the church directly pay for, if any? UTILITIES PHONE MAINTENANCE

FURNISHINGS OTHER (describe) *circle all that apply*

Honorariums

Total Honorariums you received in 2020 \$ _____

(Not included in your W-2)

Gifts

Did you receive any monetary gifts or gift cards from your church? YES NO (We will discuss)

Business Expenses

Were you reimbursed for business mileage? If yes, at what rate? YES NO**

Were you reimbursed for business travel/meals/entertainment? YES NO**

Were you reimbursed for your other business expenses? YES NO**

If yes for any of the above:

Does the church pass a resolution recognizing the reimbursement plan(s)? YES NO

Do you submit documentation of your expenses to the church, so that this is an 'Accountable Reimbursement Plan'? YES NO

***Please provide us with a categorized summary of your unreimbursed business expenses. Let's discuss as needed!*

Church Retirement Plan

Did you contribute some of your 2020 compensation pre-tax to a 403(b) retirement savings plan sponsored by the church or your ministry? YES NO (If yes, indicate the amount) \$ _____