

# 2024 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 2024? \$ \_\_\_\_\_  
How much did you spend on your residence in 2024? \$ \_\_\_\_\_  
(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 2024 (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 2024 compensation pre-tax to a 403(b) retirement savings plan sponsored by the church or your ministry? YES NO (If yes, indicate the amount) \$ \_\_\_\_\_