

CLERGY TAX QUESTIONNAIRE

HOUSING

The following questions apply to you if you live in a church-provided parsonage.

Did your church board declare a "Parsonage Allowance" for you in 2009 _____

If so, how much? \$ _____

How and at what point in the year was the parsonage allowance documented by your church?

The following questions apply to you if you do not live in a church-provided parsonage.

Did you own or rent your home in 2009 _____

If you owned your home, did you buy it in 2009 or refinance an existing home?

_____ (If so please include a copy of your closing statement with your tax materials.)

Did you perform any major improvement on your home in 2009 ? _____

If so, briefly describe; _____

What was your church board's designated "Housing Allowance" for you in 2009

How and at what point in the year was your housing allowance documented by your church? _____

How was the housing allowance conveyed to you for tax purposes on your W-2?

Not conveyed to me. My W-2 includes all cash remuneration without any reduction for my housing allowance.

W-2 Form has been reduced by church-designated housing allowance.

Other treatment (describe). _____

List below your actual Housing Expenses. (See last page for a worksheet.)

\$ _____ In your estimation, do your housing expenses exceed the fair rental value of your home (including furnishings, utilities, etc.)? _____

FRINGE BENEFITS

Please designate which of the fringe benefits listed below your church provided to you in 2009.

403 B Retirement Plan

Other Retirement Plan

If yes to either of the above, did you make voluntary contributions in 2008?

Automobile Provided to You

Life Insurance in Excess of \$50,000

Moving Expenses

Health Insurance Coverage

Cafeteria Plan

Other: Describe _____

OTHER

Did your church maintain a Fully Accountable Reimbursement Plan in 2009 _____

(i.e. One that (1) Reimburses only those expenses that are substantiated as to date, amount, and business purpose and (2) require that any "excess reimbursements" be returned to the church.)

If the answer to the above is no, briefly describe the reimbursement method in effect at your church as regarding reimbursement of ministry expenses that you incur and tax treatment on your W-2 Form.

Did you receive any free will offerings or gifts from your church or any of its members in 2009 If so briefly describe dollar amounts and tax treatment below.

Did you incur any ministerial expenses in 2008 for which your church did not reimburse you? If so, describe the expenses and list their respective dollar amounts below:

_____ \$ _____ _____ \$ _____
_____ \$ _____ _____ \$ _____

Do you maintain an office in your home used exclusively and on a regular basis for ministerial duties? _____

MINISTER'S SUMMARY OF HOUSING EXPENSES

Name: _____

Tax Year 2009

ITEM:

Rent on Home

\$

Garage Rental

Down Payment, Legal, Loan, and Title Fees on
Purchase of Home

Mortgage Payments (Principal & Interest)

Real Estate Taxes on Home

Insurance (Homeowners, Renters)

Utilities: Gas & Electricity

Water

Telephone (Exclude Long Distance Charges)

Cable T.V.

Furnishings & Appliances

Repairs & Maintenance, Cleaning

Improvements

Lawn Care, Landscaping

Other Allowable Expenses (Specify)

GRAND TOTAL:

\$
