

Clergy Worksheet for ordained or licensed pastors, ministers, priests and rabbis

Worksheet for: ___ Primary Taxpayer ___ Spouse

- Attach a copy of your housing allowance and/or exclusion letter(s) or declaration(s) or pay agreement(s) for this tax year & next, if available.
- Visit <https://sharetheharvest.com/tax-tools/clergy-sample-w-2-form-worksheet/> for help preparing clergy W-2s.

Weddings, funerals, speaking fees or other honorariums for Schedule C

\$ _____

- Please explain if this figure includes amount(s) shown on Form(s) 1099-MISC and include copies of the Forms 1099.
- Please provide state/city detail if the amount(s) were earned in other than your home city.

_____ \$ _____

_____ \$ _____

- Directly-related expenses (list type & amount):

_____ \$ _____

_____ \$ _____

_____ \$ _____

♥ Clergy Housing Worksheet for ordained & licensed ministers, priests & rabbis [§107]

List totals for the year for primary residence only: ___ Client ___ Spouse

Please check if _____ Parsonage or _____ Clergy-owned or rented dwelling.
 If you moved, list expenses for each house in separate columns & organize by date.

(1) Allowance or Exclusion designated per written agreement & received (1) \$ _____

(2) PARSONAGE: Fair rental value of employer-owned home, no utilities A \$ _____

Fair rental value of furniture & furnishings if known B \$ _____

Employer Paid Utilities Only:

- Electric/Solar \$ _____
- Gas/Oil/propane _____ \$
- Phone (personal local land-line only) \$ _____
- Cable/Internet/Satellite/Dish/Netflix/Hulu \$ _____
- Trash \$ _____
- Sewer/Water/Septic \$ _____
- Total Utilities provided.....C \$ _____

Total for Employer owned housing: (add A+B+C) (2) \$ _____

(3) Actual expenses paid from housing allowance or furnishing exclusion allowance or clergy pension:

- Mortgage payments or rent, annual total. \$ _____
- Real estate taxes (if not included in mortgage) \$ _____
- Insurance (if not included in mortgage) \$ _____
- Utilities (do not include amounts paid by employer)
 - Cable/Internet/Satellite \$ _____
 - Electric \$ _____
 - Gas/Oil/propane/heating fuel \$ _____
 - Phone (personal, local, land-line only) \$ _____
 - Sewer/Water/Septic \$ _____
 - Trash \$ _____
- Repairs, maintenance, & improvements \$ _____
- Furniture, furnishings, & appliances \$ _____
- Landscaping, lawn mower, fertilizer etc. \$ _____
- Cleaning supplies, light bulbs, etc. \$ _____
- Decorating, painting, wallpapering, etc. \$ _____
- Carpeting, flooring, ceiling fans, etc. \$ _____
- Homeowners Association or condo fees \$ _____
- Other house related expenses: \$ _____
- Total (3) \$ _____**

Net Housing Exclusion: Enter the lower number from 1, 2, or 3 \$ _____

DO NOT INCLUDE: Lawn mowing or maid services, groceries, personal toiletries, paper products, clothing, cellular phones, long-distance phone, or home equity loans not used for housing-related expenses.

Energy Related: List all energy-saving improvements. Extra tax savings are available for Solar Panels, heating and cooling systems, windows, insulation, hot water tanks, among other items. Note if financed.