

Estimated Income for Next Year

Write “**Same**” if everything will remain about the same for next year.

Salary	
Clergy housing allowance (please note if expecting expenses to be less)	
Pension/retirement income	
Social security benefits	
Interest and dividend income	
Other income	

Significant changes expected to occur next year (e.g. child may no longer qualify as a dependent):

Are you saving enough for retirement? Yes No

You may wish to consider our financial planning services through S. D. Clifford Advisors, LLC.

Your employer may wish to consider our payroll services or a retirement plan through Harvest Pension Group, LLC.