

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

Worksheet for: Client Spouse

Income

Weddings, Funerals or Honorariums (Please note if this figure includes amount(s) shown on Form(s) 1099-MISC.)	
Any flat-rate reimbursements or allowances (e.g. gas allowance), except housing, for which you were NOT required to provide proof of the related expenditures and that are NOT shown on the Form W-2 or Form 1099.	

Housing Allowance Exclusion Worksheet

Total housing/furnishing allowance designated, earned, and received (This amount should not be included in Box 1 of Form W-2.)	
Fair rental value of housing and furniture plus any utilities paid for by the church: (This amount should not be included in Box 1 of Form W-2.)	

Actual Expenses:

Total payments you made in the year for mortgage OR rent on primary residence only	
Total real estate taxes you paid in the year on primary residence. (If not included in mortgage payments.)	
Total house/property or renter's insurance you paid in the year. (If not included in mortgage payments.)	
Total utilities you paid in the year. (gas, electric, water, sewer, septic, cable/dish, internet service, local phone) Exclude personal long distance calls & cell phones.	
Total repairs, maintenance, and improvements on the house you paid for in the year.	
Total outdoor expenses you paid in the year (fertilizer, lawn mower, etc., but NOT lawn mowing service)	
Total you spent on furnishings, appliances and furniture in the year.	
Total you spent on minor purchases. (light bulbs, cleaning supplies, Christmas decorations etc.)	
Other expenses. (list type & amounts)	
TOTAL EXPENSES:	

DO NOT INCLUDE: Labor hired for maintenance or maid service, groceries, personal toiletries, paper products, personal clothing, toys, computer games, VCR or DVD movies, cell phones, and home equity loans not used for housing-related expenses.