

Minister's Name \_\_\_\_\_ Ministry/Church Name \_\_\_\_\_ S. S./EIN # \_\_\_\_\_ Tax Year \_\_\_\_\_  
 Ministry Address \_\_\_\_\_ City, State, & Zip Code \_\_\_\_\_ (A/C) Ministry Phone # \_\_\_\_\_

**THIS WORKSHEET TO BE USED ONLY BY FULLY ORDAINED MINISTERS.** Have you filed Form 4361 to be exempt from S-E tax?

\* Please note that you CANNOT deduct expenses for an office in the home if you are receiving a parsonage/housing allowance.

Date You Started Your Ministry \_\_\_\_\_; Claimed last yr.? \_\_\_\_\_

**RECEIPTS (total \$s received net of discounts) (@ RETAIL)**

Salary (excluding Housing Allowance) (W-2) \$ \_\_\_\_\_

Housing Allowance (can't claim Office in Home) \$ \_\_\_\_\_

Revival Offerings & Speaking Engagements \$ \_\_\_\_\_

Book, Tape, Video, etc. Sales Including Tax \$ \_\_\_\_\_

Other Income (ex., reimbursements) (specify) \$ \_\_\_\_\_

\* Personal use, gifts, & invent. valued @ wholesale = your cost

**COST OF BOOKS/CDs/DVDs etc. (RE)SOLD (@ WHOLESALE)**

Beginning Inventory on 1/1/\_\_\_\_ (if 1st yr., = "0") \$ \_\_\_\_\_

Purchases of Books/CDs etc. for Resale + tax \$ \_\_\_\_\_

Personal Use of Saleable Products (@ wholesale) \$ \_\_\_\_\_

Saleable Products Given Away (@ wholesale) \$ \_\_\_\_\_

Cost of Labor to Produce Books/CDs/DVDs etc. \$ \_\_\_\_\_

Materials & Supplies to Produce Books/CDs etc. \$ \_\_\_\_\_

Ending Inventory on 12/31/\_\_\_\_ (@ wholesale) \$ \_\_\_\_\_

\* The office in home space must be used exclusively for ministry

**OFFICE IN HOME DATA (if 2 homes used, separate by a ";")**

Office & Storage: Sq. Ft. | & # of entire rooms used \_\_\_\_\_ | \_\_\_\_\_

Entire Home: Sq. Ft. (excl. garage) | & # of rooms \_\_\_\_\_ | \_\_\_\_\_

Date Apartment/House Rented or Purchased \_\_\_\_\_

Purch. Price + Closing + Improve. Prior to Min. \$ \_\_\_\_\_

Est. Value of Land Only (county tax appraisal) \$ \_\_\_\_\_

**OFFICE IN HOME DEDUCTIONS (for 2, separate by a ";")**

Mortgage Int. (only) (Form 1098/coupon book) \$ \_\_\_\_\_

Real Estate Taxes (Form 1098/coup. book/checks) \$ \_\_\_\_\_

Homeowner/Hazard/Renter's Insur. (1098/checks) \$ \_\_\_\_\_

Rent (NOT mortgage) Pymts. (while in ministry) \$ \_\_\_\_\_

Repairs (put improve. on Depr. W/s only), Lawn \$ \_\_\_\_\_

Utilities: Gas \$ \_\_\_\_\_ Water \$ \_\_\_\_\_ Electric \$ \_\_\_\_\_

Security, Pest, Housekeeper, & Association Fees \$ \_\_\_\_\_

\* IRS REQUIRES THAT YOU KEEP A MILEAGE LOG \*

\* = Circle "Leased" if car was leased, and... CAR DATA FOR EACH CAR USED IN MIN. ...draw an arrow to which car was leased.\*

Year, Make and Model \_\_\_\_\_;

Date Purchased/Leased\* \_\_\_\_\_;

Purchase/Lease Price Incl. Tax \$ \_\_\_\_\_; \$ \_\_\_\_\_

**OPERATING EXPENSES (Only Those Personally Pd. By You)**

Advertising & Promotion (business cards/flyers) \$ \_\_\_\_\_

Bank Fees (on separate ministry accounts) \$ \_\_\_\_\_

Church Property Insurance (Paid by You) \$ \_\_\_\_\_

Loan/Credit Card Interest Used for Ministry \$ \_\_\_\_\_

Ministry Legal/Tax/Professional Fees (tax prep.) \$ \_\_\_\_\_

Sun. Sch./Off. Supp. (furn./equip. on Depr. W/s) \$ \_\_\_\_\_

Church Rent (incl. meeting rooms Paid by You) \$ \_\_\_\_\_

Car or Equip. (ex., copier) Rentals (Paid by You) \$ \_\_\_\_\_

Church Bldg./Equipment Repairs (Paid by You) \$ \_\_\_\_\_

Taxes (sales & payroll) Paid & Minister's License \$ \_\_\_\_\_

Ministry Travel (plane/train/bus) (Paid by You) \$ \_\_\_\_\_

Ministry Hotels (at local or out-of-town meetings) \$ \_\_\_\_\_

Ministry Meals (seminars/luncheons/out-of-town) \$ \_\_\_\_\_

Food/Refreshments (ministry dinners/fellowships) \$ \_\_\_\_\_

Entertainment (of parishioners or ministers) \$ \_\_\_\_\_

Church Utilities (phone, electric) (Paid by You) \$ \_\_\_\_\_

2<sup>nd</sup>, Separate, Ministry Ph. Line + Min. Long Dist. \$ \_\_\_\_\_

Cell Ph., Beeper, Call Notes (ministry use only)\* \$ \_\_\_\_\_

Gifts of Benevolence (cash/food/clothes) \$ \_\_\_\_\_

Seminary/Bible Coll. Tuition + Books/CDs/DVDs \$ \_\_\_\_\_

Ministry Postage (stamps) & Freight (Pd. by you) \$ \_\_\_\_\_

Publications (religious newspapers/magazines) \$ \_\_\_\_\_

Personal Dues to Church Denomination \$ \_\_\_\_\_

Uniforms/Robes + Uniform Cleaning/Alterations \$ \_\_\_\_\_

Other (describe) \_\_\_\_\_ \$ \_\_\_\_\_

**TOTAL (full year) CAR EXPENSES Car #1 Car #2**

Gas, Repairs, Parts, Maint., & Car Wash \$ \_\_\_\_\_; \$ \_\_\_\_\_

Insurance, Tags, Inspec. Sticker, & AAA \$ \_\_\_\_\_; \$ \_\_\_\_\_

Car Loan Interest (only)/Lease\* Payments \$ \_\_\_\_\_; \$ \_\_\_\_\_

Parking & Tolls \$ \_\_\_\_\_; Inclusion Amt. (I'll do) \$ \_\_\_\_\_; \$ \_\_\_\_\_

\*\* I ATTEST TO THESE MILEAGE FIGURES (initial) \*\*

Miles Driven for Ministry Purposes Only \_\_\_\_\_;

Total Miles the Vehicle Was Driven (full yr.) \_\_\_\_\_;

R. T. Job Commute \_\_\_\_\_; Is there more than 1 car in your home? \_\_\_\_\_

**TAX PREP FINANCIAL SERVICES**

(Revised 1/11/16)

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Personal Income Tax Preparation  
 Personal Tax Estimating  
 Personal Tax Planning

**DO NOT add the purchase price of these items in with "Office Supplies" or home office "Repairs".**

**FOR REPEAT CLIENTS, REPORT JUST THE CHANGES TO WHAT WE HAVE ON FILE FROM LAST YEAR.**

**DEPRECIATION WORKSHEET FOR**  
**(name of job/bus./min./rental activity) \_\_\_\_\_**

**\*\* Complete the first four columns, even if purchased prior to going into business or ministry. Include home improvements if you have a home office, equipment upgrades, software, desk, chair, lamp, file cabinet, bookshelf, table, computer, Ipad, Ipod, calculator, scanner, copier, fax machine, TV, VCR, DVD player, stereo, cassette player, telephones, cell phones, answering machine, camera, PDA, power tools/equipment, appliances, and other capital assets.**

Description of Capital Asset (Property/Furniture/Equipment)	Month and Year Purchased	Your Cost or Basis in the Asset	Business or Invest- ment Use %	Depreciation Taken in Prior Years			
				Section 179	20___ Tax Yr	20___ Tax Yr	20___ Tax Yr
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