

2023 INCOME TAX CHECKLIST FOR MINISTERS ONLY

MINISTER'S INCOME (do not include non-ministry income)

W-2 Wages Reported	\$ _____
1099 Misc. Salary Reported	\$ _____
Housing Allowance	\$ _____
Honorarium Received	\$ _____
Allowances (<u>not</u> included in W-2/1099)	
Automobile	\$ _____
Professional Expenses	\$ _____
Social Security	\$ _____
Other: _____	\$ _____
Pension Received	\$ _____

Have you opted out of Social Security? Yes _____ No _____

MINISTER'S HOUSING ALLOWANCE EXPENSES

Total Mortgage Payments Paid in 2023	\$ _____
Property Tax (<u>not</u> included in Mtg. Pymt)	\$ _____
Insurance (<u>not</u> included in Mtg. Pymt)	\$ _____
Total Rent Payments Paid in 2023	\$ _____
Association Fees	\$ _____
Furnishings	\$ _____
Landscaping	\$ _____
Maintenance/Repairs	\$ _____
Improvements	\$ _____
Utilities (including base rate of <i>landline</i> phone, cable, satellite, & internet)	\$ _____
Other: _____	\$ _____
TOTAL EXPENSES:	\$ _____

Note: Please ask the person issuing the W-2 or 1099 Misc. to provide you with an explanation of how the final salary number was figured. This should include all compensation received by you, including allowances by classification, but not reimbursements.

Please use the Miscellaneous Deductions Section on page 2 of the Income Tax Checklist for your ministerial expenses if your income was reported on a form W-2. Use the Self-Employed Business Income and Expense Section on page 3 if you received a form 1099-MISC.

****SEE TAX QUESTIONNAIRE FOR ADDITIONAL QUESTIONS FOR ALL CLIENTS****