

TAX ORGANIZER

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Please print this form out and fill in the boxes that apply to you. This will save you time and help us to reduce cost to you.
 (If you are a new client, please bring/send a copy of last years tax return)

FOR TAX YEAR _____

FOR PASTORS & CERTAIN RELIGIOUS WORKERS

Most Ministers need to attach a separate page for additional information.

PASTORIAL & PROFESSIONAL INCOME

Please Attach all 1099's

Church Salary	\$ _____
Bonuses	\$ _____
Special Services	\$ _____
Other Pastorial Incomes	\$ _____
Nature & Source	\$ _____
Non-Taxable (Love Offerings & Gifts)	\$ _____

Does your church assist you in non-taxable compensation?	
If yes, list _____	
Car Payments	\$ _____
Car Insurance	\$ _____
House Payments	\$ _____
Rent Payments	\$ _____

PROFESSIONAL EXPENSES

AUTO EXPENSE

Total Miles Driven	_____
Total Professional Miles	_____
Or Professional Percentage	_____
Car License Fees & Tolls	\$ _____
Car Interest	\$ _____
Car Sales Tax	\$ _____

PARSONAGE EXPENSES

Do You Own?	_____
Do you Rent?	_____
Rent	\$ _____
Mortgage Interest	\$ _____
Property Taxes	\$ _____
Gas	\$ _____

OPTIONAL AUTO EXPENSE

(USE AMOUNTS SPENT)

Gas Expense	\$ _____
Oil & Lubrication	\$ _____
Filters	\$ _____
Auto Club	\$ _____
Towing & Auto Rentals	\$ _____
Washing & Waxing	\$ _____
Car Care Products	\$ _____
Tires	\$ _____
Batteries	\$ _____
Belts & Antifreeze	\$ _____
Shocks	\$ _____
Upholstry	\$ _____
Sound Equipment	\$ _____
Tune-ups	\$ _____
Other Engine Repairs	\$ _____
Other Auto Repairs	\$ _____
Insurance	\$ _____
Lease Payments	\$ _____
Accident Repairs	\$ _____

Electricity	\$ _____
Water & Sewer	\$ _____
Garbage	\$ _____
Gardening, Yardwork	\$ _____
Cleaning	\$ _____
Insurance	\$ _____
Pest Control	\$ _____
Repairs (list)	\$ _____
Carpentry	\$ _____
Decorating	\$ _____
Electrical	\$ _____
Furnace	\$ _____
Air Conditioning	\$ _____
Filters	\$ _____
Painting Inside	\$ _____
Painting Outside	\$ _____
Plumbing	\$ _____
Roofing	\$ _____
Carpet	\$ _____
Carpet Cleaning	\$ _____

PROFESSIONAL TRAVEL & ENTERTAINMENT

Plane Fares*	\$ _____
Bus & Trains*	\$ _____
Taxi Fares*	\$ _____
Motels & Hotels*	\$ _____
Out of Town Meals*	\$ _____
Tips*	\$ _____
Entertaining Meals Out*	\$ _____
Entertaining In Home*	\$ _____
House Sitting / Child Care	\$ _____

(*Keep receipts & diary for 3 years)

PARSONAGE EXPENSE (CONTINUED FROM PAGE 1)

Food	\$ _____
Household & Cleaning Supplies	\$ _____
Furniture Purchased	\$ _____
Appliance Purchased	\$ _____
Appliance Repaired	\$ _____
Additions	\$ _____
Remodeling	\$ _____
Assesments	\$ _____
Sound & Video Items	\$ _____
What is the fair rental value of your home?	\$ _____

PROFESSIONAL CONTINUING EDUCATION (Not to become a minister)

Tuition \$ _____
 Books \$ _____
 School & Study Supplies \$ _____
 Transportation Expense \$ _____
 Meals \$ _____
 Lodging \$ _____
 Educational Travel Expense \$ _____
 Educational Activity Expense \$ _____

OTHER CAPITAL ITEMS

Did you buy a new or used car? _____
 If so, how much did it cost? \$ _____
 Did you buy any new equipment? \$ _____
 Item _____ \$ _____
 Item _____ \$ _____
 Did you buy any expensive sets of books or music? \$ _____

PROFESSIONAL EXPENSES

Accounting \$ _____
 Advertising \$ _____
 Bank Charges \$ _____
 Casual Labor \$ _____
 Commissions \$ _____
 Dues & Professional Societies \$ _____
 Insurance (office or professional) \$ _____
 Interest (professional) \$ _____
 Clerical Uniforms \$ _____
 Laundry & Cleaning \$ _____
 Legal Fees \$ _____
 Office Supplies \$ _____
 Periodicals \$ _____
 Bibles \$ _____
 Gifts (showers, weddings, etc...) \$ _____
 Other (list) _____ \$ _____

Postage \$ _____
 Office Rent \$ _____
 Equipment Rent \$ _____
 Office & Equipment Repairs \$ _____
 Supplies \$ _____
 License & Professional Fees \$ _____
 Office Utilities \$ _____
 Office Telephone \$ _____
 Parsonage Telephone \$ _____
 Less Personal Long Distance \$ _____
 Cell Phone / Pager \$ _____
 General Expense \$ _____
 Religious Books \$ _____
 Sermon Material \$ _____
 Miscellaneous Expense \$ _____
 Other (list) _____ \$ _____

PASTOR'S INFORMATION

Have you excluded yourself from Social Security? _____ If you have been a minister for 2 years or less, do you wish to exclude yourself from Social Security? _____
 Does your spouse work in the ministry? _____ If so, approximately how many hours a week? _____
 Does your spouse draw a salary from your church? _____ If so, how much last year? _____