# ALVAREZ TAX

**Phone (714) 400-9201 / Fax (714) 400-9203 / tony@alvareztaxinc.com**

## SPECIALTY WORKSHEET for CLERGY

**In order to maximize your deductions, please complete this form**

**Taxpayer** _____ **Tax Year** _____

| Questions | Answers |
|---|---|
| Are you Ordained, or the equivalent? | |
| Are you exempt from paying Social Security by virtue of filing form 4361? | |
| Does your employer own and provide you parsonage? If so, what is it's rental value? | |
| Do you own your own home? | |
| What is your officially designated parsonage allowance? (Specify annual or monthly amount) | |

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|---|---|
| Accounting and Tax Preparation Fees and Software | |
| Advertising - Business Cards | |
| Advertising - Magazine, Papers and Signs | |
| Alarm Service | |
| Bank Charges | |
| Bookkeeping | |
| Clergy Related Travel-Luggage | |
| Clergy Related Credit Card - Annual Fees | |
| Clergy Related Casual Labor | |
| Clergy Specific Clothing | |
| Cost of Books of Faith and Religious Literature | |
| Delivery - FedEx or UPS | |
| Dues - Religious Societies | |
| Education - Books | |
| Education - Seminary Classes | |
| Education - Continuing Education | |
| Education - Conventions and Seminars | |
| Education - Mileage | |
| Education - Professional Development | |
| Emblems - Religious Jewelry, etc. | |
| Entertainment - Youth Groups, Counseling, etc. | |
| Equipment Repairs | |
| Equipment Rentals | |
| Gifts - **($25 Maximum Per Person)** | |
| Interest on Business Mortgage | |
| Licenses | |
| Maintenance and Maintenance contracts | |
| Notary Fees | |
| Office Supplies | |
| Office Supplies - Water Delivery | |
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| Payroll Paid Others **(W2's)** | |
| Payroll Taxes | |
| Pest Control | |
| Postage | |
| Printing | |
| Professional Services | |
| Software | |
| Transportation Expenses | |
| Travel, Airfares & Hotel | |
| Travel Meals | |
| Travel Mileage | |
| Uniforms - Shirts, Shoes, Repairs and Purchases | |
| Uniform Cleaning or Laundry at **$3.00 Per Load** | |
| Equipment Purchased This Year: | |
| Equipment Depreciation **(From Prior Years)** | |
| | |
| **PARSONAGE - METHOD ONE** | |
| Value of Parsonage Owned By Church | |
| Rent or Principal Payments | |
| Taxes | |
| Interest | |
| Insurance | |
| Repairs and Maintenance | |
| Furniture, Appliance, etc. | |
| Utilities | |
| | |
| **TOTAL METHOD ONE:** | |
| **PARSONAGE METHOD TWO** | |
| Fair Rental Value of Parsonage | |
| Fair Rental Value of Furniture and Fixtures | |
| Utilities | |
| Miscellaneous | |
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