

Tax Prep Checklist for Ministers and the Clergy

Filing your business tax returns can be very complicated and overwhelming. This checklist will let you know what you need and help you get organized. This list will help us do our job. It is a concise, though not exhaustive, outline of some of the documents we will need when we meet with you.

Parsonage Allowance

- Allowance Received
- Interest – Home
- Taxes – Home
- Repairs – Home
- Insurance – Home
- Utilities – Home
- Other: _____

Supplies & Expenses

- Books – Music & Theology
- Business Cards
- Clerical Service
- Entertainment (enter 100% of expenses)
- Insurance – Business
- Legal & Professional Services
- Map Book
- Pager
- Photocopy & Greeting Cards
- Postage
- Software – Appointment/Calendar
- Software – Genealogy
- Software – Word Processing
- Vestments
- Vestments – Repair
- Computer
- On-line Services
- Other: _____

Telephone Expenses

- Cellular Calls
- FAX Transmissions
- Paging Service
- Toll Calls & Pay Phone
- Other: _____

Miscellaneous Expenses

- Business & Professional Associations
- Professional Subscriptions
- Other: _____

Auto Travel (in miles)

- Educational
- Funerals
- Infirm – Hospital Visits
- Parishioner Meetings
- Weddings
- Visitation
- Outings – Congregation
- Tolls & Parking (\$)
- Other: _____

Travel – Out of Town

- Airfare
- Car Rental
- Parking
- Bus, Subway & Taxi
- Lodging (do not combine with meals)
- Meals (do not combine with lodging)
- Porter, Bell Captain
- Laundry
- Bridge & Highway Tolls
- Telephone
- Other: _____

Continuing Education

- Correspondence Course Fees
- Course Registration
- Materials & Supplies
- Photocopy Expense
- Reference Material
- Seminar Fees
- Textbooks
- Other: _____

Equipment Purchases

- Computer & Printer
- Answering Machine
- Calculator & Copier
- FAX Machine
- Pager
- Telephone
- Other: _____