



The Life Financial Group, Inc.

978 Ben Franklin Hwy. (Route 422 east) Douglassville, PA 19518

(610) 385-4500

FAX (610) 385-6868

(800) 688-5800

Wealth Management from a Biblical World View since 1978

www.TheLIFEGroup.org

Carla Stangl, Tax Manager / Email: Carla@TheLifeGroup.org

Pastor's Tax Worksheet

{Please provide all of the following information for your tax return}

Housing Allowance/Expenses:

- ▶ Housing Allowance \$ _____
- ▶ Housing Expenses
 - Rent/Mortgage Payments \$ _____
 - Furniture/Appliances, etc. \$ _____
 - Utilities \$ _____
 - Cleaning/Maintenance Supply \$ _____
 - Repairs \$ _____
- Total Housing Expenses: \$ _____

Other Income:

- ▶ Honorariums \$ _____
- ▶ Other \$ _____

Expenses against Other Income:

- | | | | |
|------------|----------|-----------------|----------|
| ▶ Books | \$ _____ | Lodging/Travel | \$ _____ |
| ▶ Meals | \$ _____ | Office Supplies | \$ _____ |
| ▶ Mileage: | # _____ | Telephone | \$ _____ |

Expenses against W-2 Pastoral Income:

- | | | | |
|-----------------------|----------|---------------------|----------|
| ▶ Office Supplies | \$ _____ | Books/Subscriptions | \$ _____ |
| ▶ Supplies | \$ _____ | Business Telephone | \$ _____ |
| ▶ Meals/Entertainment | \$ _____ | Seminars | \$ _____ |
| ▶ Educational Expense | \$ _____ | Mileage: | # _____ |

Notes:

- ♦ Have you opted out of Social Security?
- ♦ If so; How many quarters were paid into Social Security? _____
- ♦ How many quarters does your spouse have paid in? _____
- ♦ Send in a copy of your Annual Social Security Statement