

SOMMERVILLE & ASSOCIATES, P.C.
TAX CHECKLIST FOR MINISTERS

If you received earnings from performing services as a minister during the year, please provide the following information:

- 1. Did you contribute to a retirement plan during 2021? _____
Was the contribution withheld from your regular paychecks or made by the employer? _____

- 2. Did your employer provide you with an auto in 2021? _____
If yes, did they include the value of the personal portion on your Form W-2? _____

- 3. Did your employer pay any of the following expenses on your behalf in 2021?
Children's school tuition _____
Out of pocket medical expenses _____
Life insurance for you or your family _____
Personal expenses or credit card charges _____
Gas for personal car or employer provided auto _____

If you answered yes to any of the above and the appropriate amounts have not been included in your Form W-2 or Form 1099-MISC, please provide additional details on the back of this page.

- 4. Have you filed Form 4361 to be exempt from self-employment tax? _____
Has the IRS approved the Form 4361? _____

Please specify the date the IRS approved your Form 4361. _____
Please provide a copy for our files **if not provided previously**.

- 5. How much housing allowance did you receive in 2021? _____

How much did you spend to provide your home in 2021?

- Mortgage payment or rent _____
- Utilities (gas, electric, water, garbage, sewer, basic phone) _____
- Cable or Satellite TV _____
- Internet Connection _____
- Repairs & Maintenance _____
- Linens _____
- Landscaping _____
- Security System _____
- Furniture _____
- House Cleaning Service _____
- Other: (Please Specify) _____
- _____
- _____
- _____

What is the monthly fair rental value of your home as furnished? _____
(If furnished to Sommerville & Associates, P.C. within the past 5 years, you do not need to provide again. If you have not updated your fair rental value within the past 5 years, we recommend that an updated value be obtained.)

Signature of Taxpayer: _____ Printed Name: _____