

**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 2022? \_\_\_\_\_  
Was the contribution withheld from your regular paychecks or made by the employer? \_\_\_\_\_
  
- 2. Did your employer provide you with an auto in 2022? \_\_\_\_\_  
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 2022?  
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 2022? \_\_\_\_\_

How much did you spend to provide your home in 2022?

- 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: \_\_\_\_\_