Basic Checklist
for Ministers

- ☐ Last year's tax return and amount paid for preparing the tax return
- ☐ Social Security Numbers and birth dates for everyone on your tax return (includes you, your spouse, children and other dependents)
- ☐ All W-2 forms for you & your spouse (if applicable)
- ☐ All Un-reimbursed Business Expenses including the following:
  - Books, supplies, sermon helps
  - Ministerial Robe and Cleaning
  - Phone/Fax/Pager
  - Seminar/Workshops/Continuing Education
  - Business Miles
  - Travel (not including meals)
  - Meals and Entertainment
- ☐ Housing/Parsonage Allowance Expense Form if actual amount is not printed on W-2 * Do not include expenses from a home that you are renting to someone else on your Parsonage Report to your conference/church. Those expenses are reported separately on your tax return (and usually give you a larger deduction). If you have a 2nd home that is actively on the market to sale and is not rental property, include those expenses on your Parsonage Report. Give us a call if you need further clarification.
- ☐ All forms that say 1099 including the following:
  - 1099-MISC – self-employment or other income
  - 1099-R – Retirement and IRA withdrawals
  - 1099-INT – Interest earned on bank accounts
  - 1099-G – Government payments to you such as unemployment income or state tax refunds
  - 1099-SA – Withdrawals from Health Savings Accounts
- ☐ Any forms that say Schedule K-1
- ☐ Contributions you made to IRAs or other retirement plans
- ☐ **All Medical Insurance Forms that say 1095 including the following:**
  - Form 1095-A – Health Insurance statement from the Market Place
  - Form 1095-B – Health Coverage Statement
  - Form 1095-C – Employer Provided Health Insurance Statement
- ☐ All Forms that say 1098 including the following:
  - Form 1098-INT – Records how much you paid in mortgage interest and real estate taxes (if mortgage is paid off, list property taxes paid) * Minsters are allowed to "double dip" on mortgage interest & property taxes
  - Form 1098-E – Student Loan interest Paid
  - Form 1098-T – College Tuition Expense (including books) for you, your spouse, or children
- ☐ Personal Property taxes paid on vehicle registration (if applicable in your State)
- ☐ Closing documents (such as the HUD-1 statement(for a home you purchased)
- ☐ Charitable Contributions – including the following:
  - Amounts donated to houses of worship, schools or other charitable organizations
  - Records of non-cash charitable donations
  - Number of miles you drove for charitable purposes
- ☐ Other income and expenses (rental income and expenses, jury duty, gambling, hobby, alimony income, etc.)
- ☐ Job search expenses (if applicable)
- ☐ The date you purchased and your total investment in any stocks
- ☐ Child Care Provider's Name, Address, Federal ID# and Amount Paid for each dependent child under age 14.

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