

Ministers Checklist of Housing Expenditure

Name: _____ Year: _____

IF YOU OWN A RESIDENCE:

The amount of the mortgage payments:\$ _____
Principal\$ _____
Interest\$ _____
Taxes\$ _____
Insurance\$ _____
Down Payment and Closing costs if this is the year of purchase\$ _____

IF YOU RENT THE RESIDENCE:

The amount of the rental payments\$ _____
Insurance on the contents of the house\$ _____

IF YOU OWN, RENT OR USE A PARSONAGE:

Repairs, improvements, additions\$ _____
(Painting, Maintenance, Carpet, Roofing, Decks, Patio, Driveway, Carport, Garage, etc.)
Furniture and appliances purchased\$ _____
(Dishes, tableware, utensils, chairs, stove, refrigerator, etc.)
Repair of furniture and appliances\$ _____
(Lawnmowers tuned, lawn tools and supplies, etc)\$ _____
Decorator items (Rugs, Drapes, Curtains, Pillows, etc.)\$ _____
Linens (Sheets, blankets, bedspreads and towels, etc.)\$ _____
Electric Utility Service\$ _____
Gas Utility service, Propane, Fuel oil, etc\$ _____
Water and Sewer Utility service\$ _____
Telephone Service (except long distance)\$ _____
Garbage Pickup and Removal\$ _____
Lawn maintenance service\$ _____
Cleaning Supplies (Brooms, mops, light bulbs, cleansers)\$ _____
Condo Fees\$ _____
Other costs of housing\$ _____

TOTAL HOUSING EXPENDITURES\$ _____

Designated Housing Allowance Was\$ _____

Excess Housing to add to Taxable Income, if any\$ _____

(If there is no excess, then consider increases in the designation for the future to be sure that all tax savings are achieved.)

Be sure the Designated Allowance is excluded from Box 1 of the W-2.

THE AMOUNT OF THE HOUSING ALLOWANCE DESIGNATED

