

HOUSING ALLOWANCE WORKSHEET AND REPORT

Church: Click to typePastor: Click to typeDistrict: Click to typeDate: Click to type**Instructions: Please email copies by December 31, 2022 to:****District Superintendent, Pastor, Church Treasurer, Recording Secretary****Housing Allowance Worksheet**

To provide an estimate of actual costs which should be used to assist the pastor and local congregation to determine an appropriate Housing Allowance, one of the following figures should be used:

- | | |
|---|------------------------|
| 1. Fair rental value of housing (including major appliances) within the immediate community/school district | <u>\$Click to type</u> |
| 2. Cost of utilities | <u>\$Click to type</u> |
| Total | <u>\$Click to type</u> |

OR

- | | |
|-------------------------------------|------------------------|
| 1. Mortgage Payment Which Includes: | |
| a. Principal | <u>\$Click to type</u> |
| b. Interest | <u>\$Click to type</u> |
| c. Property Taxes | <u>\$Click to type</u> |
| d. Homeowners Insurance | <u>\$Click to type</u> |
| 2. Routine Maintenance | <u>\$Click to type</u> |
| 3. Cost of utilities | <u>\$Click to type</u> |
| Total | <u>\$Click to type</u> |

Housing Allowance

In compliance with the provisions of Section 107 of the Internal Revenue Code of 1986, the **type name of church/charge** United Methodist Church, in action at the Charge Conference of **type date of church conference**, 2022 did authorize the provision of a cash Housing Allowance (HA) of **\$type HA amount** for the period from January 1, 2023, to Dec. 31, 2023, for Rev. **type name of clergy** to the extent it is used to provide a home, this amount is to be considered a Clergy Housing Allowance Exclusion and is not to be included as reportable compensation under said section of the Code.

Pastor's Signature

Date

Secretary of Charge Conference Signature

Date