

HOUSING ALLOWANCE WORKSHEET AND REPORT

Church: \_\_\_\_\_ Pastor: \_\_\_\_\_

District: \_\_\_\_\_ Date: \_\_\_\_\_

Instructions: Hard copies to be retained by local church and clergy in case of audit. Send electronically to district office.

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 \$ \_\_\_\_\_
- 2. Cost of utilities \$ \_\_\_\_\_
- Total \$ \_\_\_\_\_

OR

- 1. Mortgage Payment Which Includes:
  - a. Principal \$ \_\_\_\_\_
  - b. Interest \$ \_\_\_\_\_
  - c. Property Taxes \$ \_\_\_\_\_
  - d. Homeowners Insurance \$ \_\_\_\_\_
- 2. Routine Maintenance \$ \_\_\_\_\_
- 3. Cost of utilities \$ \_\_\_\_\_
- Total \$ \_\_\_\_\_

Housing Allowance

In compliance with the provisions of Section 107 of the Internal Revenue Code of 1986, the \_\_\_\_\_  
 United Methodist Church, in action at the Charge Conference of \_\_\_\_\_, 2023 did authorize the provision  
 of a cash Housing Allowance (HA) of \$ \_\_\_\_\_ for the period from January 1, 2024, to December 31, 2024, for Rev.  
 \_\_\_\_\_ 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*