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PASTORAL TAXATION & COMPENSATION QUESTIONNAIRE

The purpose of the Pastoral taxation and compensation questionnaire to address two primary areas, 1) it will confirm that the way the church is handling the Pastor's compensation is compliant with IRS guidelines and 2) will seek to maximize pastoral income while minimizing the overall tax liability.

Information Reporting

1. Does the Pastor receive a W-2 or a 1099-MISC from the church? W-2 1099-MISC

Tax Withholding

2. Does the church withhold and pay social security and Medicare on behalf of the Pastor?
Yes No
3. Does the Pastor make estimated quarterly tax payments to the IRS? Yes No

Allowances

4. Does the church provide a housing allowance for the Pastor? Yes No
5. Are there other pastoral household expenses that are paid for by the church?
Yes No
6. Does the church provide clothing and transportation allowances for the Pastor?
Yes No

Planned Expenses

7. Does the church pre-pay for pastoral expenses associated with out-of-town travel on behalf of the Pastor or provide reimbursement to the Pastor for expenses?
Pre-pay Reimbursed

Primary Contact: _____ Phone: _____

Contact Email: _____

Pastor's Name: _____

Church Name: _____

Church Address: _____

Please send the completed questionnaire to: admin@qwadvisors.com or
fax to (866) 564-3399

Thank you. We will be in touch with you to explain the results of the questionnaire.