

Congregational Treasurer's Manual

Many chapters are included in the LCMS Treasurer's Manual. Below is a partial listing of topics included in the Manual:

Employment Issues

Ministers of the Gospel
Housing (Parsonage) Allowance
Lay Employees
Concordia Plans
Tax-favored Savings Plans
Business Expenses
Payroll
Tax Exempt Status
Lutheran Schools & Early Childhood Ctrs
Contributions by Donors
Unrelated Business Income
Tax and Compliance Issues

Administering the Organization

Organizing and Incorporating
Responsibilities of Financial Officers
Synod Purchasing Agreements
Risk Management and Insurance

Accounting and Finance

Bookkeeping
Budgeting
Guide for Financial Review Committee
Automated Systems

Note: the 2009-2010 manual has 2 volumes
(only volume 1 will be distributed this year)

www.lcms.org/ctm

New...a representative with **Concordia Plans Services** will give a presentation from 1 to 3 pm. There is no charge for this session and it is open to anyone interested in learning more about the Plans. Information is also online: www.concordiaplans.org

Taxes and Ministers 2009 Edition

The Congregational Treasurer's Manual will be provided (one complimentary book & CD per church). Copies of the revised document "Taxes and Ministers" will be shared. This handout, which highlights portions of the treasurer's manual, includes the following information:

- + The IRS's definition of minister
- + Employment status: W-2 or 1099
- + Housing/parsonage allowance
- + Reporting income and expenses
- + Paying federal and state taxes
- + Social Security taxes
- + Tax-favored savings plan

Iowa District West, LCMS
PO Box 1155, Fort Dodge, IA 50501
515.576.7666
www.idwlcms.org



**Saturday,
January 9, 2010 and
January 16, 2010**

**9:00 a.m.–12:30 p.m.
plus Concordia
Plans after lunch**

Iowa District West Church & Clergy Finance/Treasurer Workshop



The 2010 Workshop locations:

January 9
Immanuel, Guthrie Center
641.332.2918
January 16
First English, Spencer
712.262.5598

What are the Topics?

IRS Reporting Requirements
 Cafeteria Plans
 Congregational Treasurer's Manual:
 Housing Allowance
 Payroll
 Employee vs. Outside Contractor Status
 Contributions by Donors
 Business Expenses
 Bookkeeping
 Guide for Financial Review Committee
 Clergy Tax Issues
 Treasurer Job Description Discussion
 Other concerns by those in attendance

Who should attend the Church & Clergy Finance/Treasurer Workshop?

Bookkeepers
 Financial Secretaries
 Office Managers
 Pastors
 Stewardship Leaders
 Treasurers
 Individuals within the church having financial responsibilities

Why attend?

Practical help. This workshop provides simple, straightforward help relating to clergy tax and church treasurer issues. Bottom line: You get the tools you need to put an end to costly mistakes! The guest speaker on January 9 will be Robert Joy, Financial and Planned Giving Officer of the Episcopal Diocese of Iowa, and a practicing CPA specializing in clergy taxes, non-profit audits, and consulting. On January 16 the speaker will be Randy Gayken, South Dakota District Business Manager and Sally Bohmer, a pastor's wife with an interest in clergy taxes.

What is the Cost?

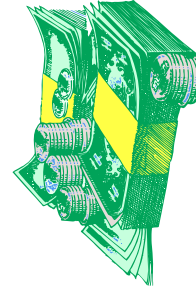
The cost is \$22 per congregation (no matter how many interested persons attend). A light lunch will be provided by Lutheran Church Extension Fund (www.lcef.org) and Carole White.

It is ideal if both the pastor and treasurer/financial officer can attend.

It's simple to register. Complete registration form and return promptly with payment. Please register by January 5.

Questions? Call Roger Curtis at 515.576.7666 or email Roger.Curtis@idwlcms.org.

Please register me for the Church & Clergy Finance/Treasurer Workshop
 _____ January 9 - Guthrie Center or _____ January 16 - Spencer _____ both workshops



Name(s): _____

Church: _____

Email Address: _____

Cell phone: _____ Home phone: _____

Financial software _____

Does your church follow the District Compensation Recommendations? Yes _____ No _____

Topics or questions you would like addressed _____

Please mail with a check for \$22 payable to Iowa District West PO Box 1155 Fort Dodge, IA 50501