|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **FORM 1** |  |  |  |  |
| **Diocese of the Midwest** | | | |  |  |
| **Parish Financial Assessment Worksheet 2023** | | | |  |  |
| **Proportional Giving: 13% of Eligible Income** | | | |  |  |
| **Parish Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City:\_\_\_\_\_\_\_\_\_\_\_\_** | | | |  |  |
|  |  |  |  |  |  |
|  |  | **FY 2023** |  |  |  |
|  | **Description** | **Income** |  |  |  |
| **Line 1** | **Gross Income (from all sources)** |  |  |  |  |
|  |  |  |  |  |  |
|  | **Less:** |  |  |  |  |
| Line 2 | Capital Campaign Contributions plus Investments income recorded into the Restricted Fund |  |  |  |  |
| Line 3 | Donor Restricted Contributions (donor has specified use) plus Investment income recorded into the Restricted Fund |  |  |  |  |
| Line 4 | Other one-time Restricted Donations (must not be for normal operating expense) |  |  |  |  |
| Line 5 | Pass-Through amount recorded for convenience of parishioners and not intended for Parish expenses (only if recorded in Gross Income) |  |  |  |  |
| Line 6 | **Total Adjustments to Income (Lines 2 through 5) Calculation** |  |  |  |  |
|  |  |  |  |  |  |
| **Line 7** | **Net Operating Income (Line 1 less Line 6) Calculation** |  |  |  |  |
|  |  |  |  |  |  |
|  | **Less:** |  |  |  |  |
| Line8 | Charitable Expenses over and above donor contributions |  |  |  |  |
|  |  |  |  |  |  |
| Line 9 | **Eligible Income for Assessment Calculation** |  |  |  |  |
|  |  |  |  |  |  |
| Line 10 | Parish requests assessment relief due to hardship. (Circle Yes or No) | Yes / No |  |  |  |
| Line 11 | If **YES**, submit this FORM 1 with a letter providing **evidence supporting your request for relief** and **a proposed** **financial** **recovery** plan to the Diocesan Archbishop’s Secretary. See Section 6.f. |  |  |  |  |
|  |  |  |  |  |  |
|  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | |
|  | Parish Rector or Priest-in-Charge | Parish Treasurer |  |  |  |
|  | Signature | Signature |  |  |  |
|  | \_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_ |  |  |  |
|  | Date | Date |  |  |  |
|  |  |  |  |  |  |

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