

FILLING OUT YOUR CFR

SECTION 1

PERSONAL INFORMATION

- This section is unchanged from previous years' forms
- List the phone you are most likely to answer, the address where you receive mail, and the email you most often check.

SECTION 2

INCOME

- This section is unchanged from previous years' forms
- Don't include annuity or gratuities from The Corporation
- Send documentation of income - tax return (if you still file), and/or SSI benefits, Church Pension, etc.

SECTION 3

EXPENSES

- Budget worksheet separated into "fixed" and "variable" expenses
- Include ONE piece of documentation for each category of expenses when possible - sample bill from previous year, etc.
- If hiring individuals for services, make sure they provide invoices

SECTION 4

SPECIAL CIRCUMSTANCES

- This section is unchanged from previous years' forms
- You are not penalized for giving or receiving financial assistance from family members
- For expected major purchases/expenses, include a written estimate or quote whenever possible

SECTION 5

AMOUNT REQUESTED

- This section is unchanged from previous years' forms
- Normally the difference between income and anticipated expenses for the year (including major purchases)

SECTION 6

SENDING OFF THE REQUEST

- By email - send to admin@episcopalcorporation.org
- By post - send to 4 E. University Pkwy, Baltimore, MD 21218
- Call 410-467-1399 ext. 1362 for questions, or email us!
- FORMS ARE DUE BY MARCH 1st

WE ARE HERE TO HELP!

Filling out forms and budgeting can be a daunting task - so please reach out if you have any questions or need assistance. You can call, email, and/or check our website for information about things like "what kind of things should I include in my budget?" or "what if my taxes aren't ready before I need to turn in the request?" You can even request help to pay for a professional to help you fill out your paperwork!

