



RELIGIOUS ORGANIZATION INFORMATION SHEET

General Information

(If more room is required, please feel free to attach an additional sheet)

1. Name of Organization: _____
2. Address of Organization: _____
3. Phone Number: () _____ - _____ extension: _____
4. Fax Number: () _____ - _____
5. Main Contact: _____
6. What is the legal structure (i.e. Corporation) _____
7. State of Incorporation: _____
8. What is your Tax I.D. #: _____
9. Name, address and phone number of representing law firm and/or attorney: _____

10. Name, address and phone number of CPA Firm and auditor: _____

11. Inception date of organization: _____
12. How long have you been at your current location? _____
13. How many worships are held and when? _____
14. When are offerings collected? _____
15. What is the seating capacity of your facility? _____
16. Name of Head Clergy person: _____
17. Length of time with organization: _____
18. Age: _____ Ordained for _____ years (if applicable)
19. Names of other staff Clergy persons and titles/roles:

20. Member of Denominational Body: _____
 If yes, which one? _____
 If yes, how is the body structured? _____
 If yes, how much does your organization contribute directly to the denominational body annually? _____

21. What committee/person is in charge of financial related decisions? _____

22. What committees/persons are in charge of other decisions? _____

23. What is the length of service for persons involved in decision making functions? _____

- (a) Can they serve for more than one term? _____
 (b) Can they serve consecutive terms? _____
24. Does the church carry a life insurance policy on the head clergy person for which the church is the beneficiary? _____

Financial Information

For questions 1-6, please list requested information for the last 5 years.

Fiscal Year Ended	_____	_____	_____	_____	_____
1. Yearly Collection Figures	_____	_____	_____	_____	_____
Actual Operating Incomes	_____	_____	_____	_____	_____
2. Membership Figures	_____	_____	_____	_____	_____
3. Giving Units (family or single units)	_____	_____	_____	_____	_____
4. Average Worship Attendance	_____	_____	_____	_____	_____
5. Average Sunday School Attendance	_____	_____	_____	_____	_____

6. Breakdown of current membership:

Under 18 _____
18-30 _____
31-60 _____
Over 60 _____

Note: If your organization has a breakdown in alternate age groupings, please use that grouping.

7. What is the current mortgage balance on the church? _____
8. What is the insured value of the church? _____
9. Total Unrestricted Contributions (last year): _____
10. Are the bank funds restricted or unrestricted? _____
11. When was the last date your membership rolls were purged? _____
12. Name and title of person(s) authorized to write checks for the organization: _____

13. Name and title of person(s) authorized to sign checks for the organization: _____

14. Name and title of person(s) responsible for reconciling Bank Statements: _____

