Assessment Form: January 2020  
Calculated using December’s income

<table>
<thead>
<tr>
<th>Congregation</th>
<th>Town</th>
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Calculating your Assessment:

**Additions (from the previous month):**

- Plate offerings, pledge payments and regular support 1.__________
- Transfers of income from investments 2.__________
- Unrestricted gifts, other income 3.__________
- Rent 4.__________

**Subtractions (from the previous month):**

- Capital or building funds, gifts and additions 5.(__________)
- Additions to endowment and other investment funds 6.(__________)
- Contributions and grants for congregation based outreach 7.(__________)
- Funds for transmittal to other organizations: e.g. UTO, ER&D
  - Discretionary funds, Habitat for Humanity, soup kitchens 8.(__________)

**Total Operating Revenues (Sum of line 1-8)** $__________

Assessment (10% of total operating revenues) $__________

Continuing Education (1% of total operating Revenues) $__________

Total Enclosed for your January Assessment: $__________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
Assessment Form: February 2020
Calculated using January’s income

Congregation__________________________  Town__________________________

Calculating your Assessment:

Additions (from the previous month):

• Plate offerings, pledge payments and regular support  1.______________
• Transfers of income from investments  2.______________
• Unrestricted gifts, other income  3.______________
• Rent  4.______________

Subtractions (from the previous month):

• Capital or building funds, gifts and additions  5.(______________)
• Additions to endowment and other investment funds  6.(______________)
• Contributions and grants for congregation based outreach  7.(______________)
• Funds for transmittal to other organizations: e.g. UTO, ER&D
  Discretionary funds, Habitat for Humanity, soup kitchens  8.(______________)

Total Operating Revenues (Sum of line 1-8)  $______________

Assessment (10% of total operating revenues)  $______________

Continuing Education (1% of total operating Revenues)  $______________

Total Enclosed for your February Assessment:  $______________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
**Assessment Form: March 2020**

Calculated using February’s income

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**Calculating your Assessment:**

**Additions (from the previous month):**

- Plate offerings, pledge payments and regular support
- Transfers of income from investments
- Unrestricted gifts, other income
- Rent

**Subtractions (from the previous month):**

- Capital or building funds, gifts and additions
- Additions to endowment and other investment funds
- Contributions and grants for congregation based outreach
- Funds for transmittal to other organizations: e.g. UTO, ER&D
- Discretionary funds, Habitat for Humanity, soup kitchens

Total Operating Revenues (Sum of line 1-8) $__________________

Assessment (10% of total operating revenues) $__________________

Continuing Education (1% of total operating Revenues) $__________________

Total Enclosed for your March Assessment: $__________________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
Assessment Form: April 2018
Calculated using March’s income

Congregation________________________  Town________________________

Calculating your Assessment:

Additions (from the previous month):

• Plate offerings, pledge payments and regular support 1.____________________
• Transfers of income from investments 2.____________________
• Unrestricted gifts, other income 3.____________________
• Rent 4.____________________

Subtractions (from the previous month):

• Capital or building funds, gifts and additions 5.(____________________)
• Additions to endowment and other investment funds 6.(____________________)
• Contributions and grants for congregation based outreach 7.(____________________)
• Funds for transmittal to other organizations: e.g. UTO, ER&D
  Discretionary funds, Habitat for Humanity, soup kitchens 8.(____________________)

Total Operating Revenues (Sum of line 1-8) $____________________

Assessment (10% of total operating revenues) $____________________
Continuing Education (1% of total operating Revenues) $____________________
Total Enclosed for your April Assessment: $____________________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
Assessment Form: May 2020
Calculated using April’s income

Congregation______________________________  Town______________________________

Calculating your Assessment:

Additions (from the previous month):
• Plate offerings, pledge payments and regular support  1._______________
• Transfers of income from investments  2._______________
• Unrestricted gifts, other income  3._______________
• Rent  4._______________

Subtractions (from the previous month):
• Capital or building funds, gifts and additions  5.(_______________)
• Additions to endowment and other investment funds  6.(_______________)
• Contributions and grants for congregation based outreach  7.(_______________)
• Funds for transmittal to other organizations: e.g. UTO, ER&D
  Discretionary funds, Habitat for Humanity, soup kitchens  8.(_______________)

Total Operating Revenues (Sum of line 1-8)  $_______________

Assessment (10% of total operating revenues)  $_______________

Continuing Education (1% of total operating Revenues)  $_______________

Total Enclosed for your May Assessment:  $_______________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
Assessment Form: June 2020
Calculated using May’s income

Congregation_________________________ Town_________________________

Calculating your Assessment:

Additions (from the previous month):

• Plate offerings, pledge payments and regular support 1.____________________
• Transfers of income from investments 2.____________________
• Unrestricted gifts, other income 3.____________________
• Rent 4.____________________

Subtractions (from the previous month):

• Capital or building funds, gifts and additions 5.(____________________)
• Additions to endowment and other investment funds 6.(____________________)
• Contributions and grants for congregation based outreach 7.(____________________)
• Funds for transmittal to other organizations: e.g. UTO, ER&D
  Discretionary funds, Habitat for Humanity, soup kitchens 8.(____________________)

Total Operating Revenues (Sum of line 1-8) $____________________

Assessment (10% of total operating revenues) $____________________

Continuing Education (1% of total operating Revenues) $____________________

Total Enclosed for your June Assessment: $____________________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
Assessment Form: July 2020
Calculated using June's income

Congregation__________________________ Town__________________________

Calculating your Assessment:

Additions (from the previous month):

- Plate offerings, pledge payments and regular support 1.______________
- Transfers of income from investments 2.______________
- Unrestricted gifts, other income 3.______________
- Rent 4.______________

Subtractions (from the previous month):

- Capital or building funds, gifts and additions 5.(______________)
- Additions to endowment and other investment funds 6.(______________)
- Contributions and grants for congregation based outreach 7.(______________)
- Funds for transmittal to other organizations: e.g. UTO, ER&D Discretionary funds, Habitat for Humanity, soup kitchens 8.(______________)

Total Operating Revenues (Sum of line 1-8) $______________

Assessment (10% of total operating revenues) $______________

Continuing Education (1% of total operating Revenues) $______________

Total Enclosed for your July Assessment: $______________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
Assessment Form: August 2020
Calculated using July's income

Congregation_________________________ Town___________________________

Calculating your Assessment:

Additions (from the previous month):

• Plate offerings, pledge payments and regular support 1.______________
• Transfers of income from investments 2.______________
• Unrestricted gifts, other income 3.______________
• Rent 4.______________

Subtractions (from the previous month):

• Capital or building funds, gifts and additions 5.______________
• Additions to endowment and other investment funds 6.______________
• Contributions and grants for congregation based outreach 7.______________
• Funds for transmittal to other organizations: e.g. UTO, ER&D Discretionary funds, Habitat for Humanity, soup kitchens 8.______________

Total Operating Revenues (Sum of line 1-8) $______________

Assessment (10% of total operating revenues) $______________
Continuing Education (1% of total operating Revenues) $______________
Total Enclosed for your August Assessment: $______________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
Assessment Form: September 2020
Calculated using August’s income

Congregation ____________________________ Town ____________________________

Calculating your Assessment:

Additions (from the previous month):

• Plate offerings, pledge payments and regular support 1. ________________
• Transfers of income from investments 2. ________________
• Unrestricted gifts, other income 3. ________________
• Rent 4. ________________

Subtractions (from the previous month):

• Capital or building funds, gifts and additions 5. (______________)
• Additions to endowment and other investment funds 6. (______________)
• Contributions and grants for congregation based outreach 7. (______________)
• Funds for transmittal to other organizations: e.g. UTO, ER&D
  Discretionary funds, Habitat for Humanity, soup kitchens 8. (______________)

Total Operating Revenues (Sum of line 1-8) $______________

Assessment (10% of total operating revenues) $______________

Continuing Education (1% of total operating Revenues) $______________

Total Enclosed for your September Assessment: $______________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
**Assessment Form: October 2020**

*Calculated using September’s income*

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**Calculating your Assessment:**

**Additions (from the previous month):**

1. Plate offerings, pledge payments and regular support
2. Transfers of income from investments
3. Unrestricted gifts, other income
4. Rent

**Subtractions (from the previous month):**

5. Capital or building funds, gifts, and additions
6. Additions to endowment and other investment funds
7. Contributions and grants for congregation based outreach
8. Funds for transmittal to other organizations: e.g. UTO, ER&D

**Total Operating Revenues (Sum of line 1-8)**

$___________

**Assessment (10% of total operating revenues)**

$___________

**Continuing Education (1% of total operating Revenues)**

$___________

**Total Enclosed for your October Assessment:**

$___________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
Assessment Form: November 2020
Calculated using October's income

Congregation_________________________________  Town________________________

Calculating your Assessment:

Additions (from the previous month):
• Plate offerings, pledge payments and regular support   1._____________________
• Transfers of income from investments                    2._____________________
• Unrestricted gifts, other income                     3._____________________
• Rent                                                   4._____________________

Subtractions (from the previous month):
• Capital or building funds, gifts and additions     5._____________________
• Additions to endowment and other investment funds    6._____________________
• Contributions and grants for congregation based outreach  7._____________________
• Funds for transmittal to other organizations: e.g. UTO, ER&D
  Discretionary funds, Habitat for Humanity, soup kitchens  8._____________________

Total Operating Revenues (Sum of line 1-8)        $____________

Assessment (10% of total operating revenues)            $____________
Continuing Education (1% of total operating Revenues)    $____________
Total Enclosed for your November Assessment:            $____________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.
Assessment Form: December 2020
Calculated using November's income

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Calculating your Assessment:

Additions (from the previous month):

- Plate offerings, pledge payments and regular support 1. ________________
- Transfers of income from investments 2. ________________
- Unrestricted gifts, other income 3. ________________
- Rent 4. ________________

Subtractions (from the previous month):

- Capital or building funds, gifts and additions 5.(______________)
- Additions to endowment and other investment funds 6.(______________)
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- Funds for transmittal to other organizations: e.g. UTO, ER&D Discretionary funds, Habitat for Humanity, soup kitchens 8.(______________)

**Total Operating Revenues (Sum of line 1-8)** $______________

- **Assessment (10% of total operating revenues)** $______________
- **Continuing Education (1% of total operating Revenues)** $______________
- **Total Enclosed for your December Assessment:** $______________

Please fill this form out entirely and send the form, along with payment and financial statements to the diocese by the 10th of each month.