

Church Electronic Resources for Treasurers

Church Management Programs

Recommendation 1: look at packages designed specifically for churches with membership, accounting, contribution tracking, etc.

Recommendation 2: Ask for free samples/demos.

Recommendation 3: Talk with other churches who have used the programs.

The list below is for informational purposes only, none are being recommended or endorsed.

ACS acstechnologies.com

Who uses? Grace, Sheboygan; Trinity, Oshkosh; and Intercession, Stevens Point.

Church Windows churchwindows.com

Who uses? St. Anne's, DePere and Blessed Sacrament, Green Bay

CMS churchmanagementsolutions.com

Who uses? None known but was used by the Diocesan Office Secretary (who gives it a thumbs up).

Power Church powerchurch.com

Who uses? St. Paul's Cathedral, Fond du Lac; St. Thomas, Menasha; Holy Apostles, Oneida; St. Peter's, Ripon; Christ the King Holy Nativity, Sturgeon Bay; St. John's, Wisconsin Rapids.

We recommend NOT using Quickbooks as it is not a good platform for using Fund Accounting, which is important to most congregations.

Some programs have Episcopal specific modules, which make parochial report processing easier, as well as tracking members for the church register. Each area should have password protection.

Available Resources Online / Forms and Publications

(search for the terms listed)

www.irs.gov

- Form W-2 (Wage and Tax Statement)
- Form W-3 (Transmittal of Wage and Tax Statements)
- Form W-4 (Employee's Withholding Allowance Certificate)
- Form W-9 (Request for Taxpayer Identification Number and Certificate)
- Form 1099-MISC (Miscellaneous Income)
- Form 1096 (Annual Summary and Transmittal of U.S. Information Returns)
- Publication 15 (Circular E Employers Tax Guide)
- Tax Guide for Churches and Religious Organizations
- Publication 526 (Charitable Contributions)
- Form 941 (Employer's Quarterly Federal Tax Return)
- Form 944 (Employer's Annual Federal Tax Return)

episcopalchurch.org

Manual of Business Methods in Church Affairs

Other Documents available at cpg.org

Areas covered include:

- Health Plans / Episcopal Church Medical Trust
- Life Insurance
- Long-Term Disability Insurance
- Pension Information, both Clergy and Lay
- Property & Casualty Insurance
- Research on Episcopal specific questions
- Retirement Savings Plan (RSVP)
- Short-Term Disability Insurance
- Tax Reporting Requirements

cpg.org

- Federal Reporting Requirements for Episcopal Churches
- A Reference for Pension Administrators
- New Assignment Notice
- Report of Change in a Cleric's Compensation or Duties

pr.dfms.org (Need UEID and password to enter)

- Parochial Report

www.uscis.gov

- Employment Eligibility Verification (for form I-9)

revenue.wi.gov

- Publication 201 (Wisconsin Sales and Use Tax Information)
- S-211 (Sales and Use Tax Exemption Certificate)
- WT-4 (Employee's Wisconsin Withholding Exemption Certificate/New Hire Reporting)