



# GREEK ORTHODOX METROPOLIS <sup>OF</sup> ATLANTA

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## ΙΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΑΤΛΑΝΤΑΣ

January 26, 2018

### **National Ministries Allocation Form** *Instructions for Completing the 2019 Allocation Form*

On behalf of His Eminence Metropolitan Alexios, we are pleased to provide the attached **2019 National Ministries Allocation Form**. To aid in the preparation of the form, please consult the *National Ministries Allocation System Manual* which includes definitions and instructions, as well as examples of completed Allocation Form and Financial Documents. The Manual was prepared by the Archdiocese Finance Committee and it is consistent across all Metropolises in the Archdiocese, with the exception of a few Metropolis-specific deductions. The manual can be downloaded from the Metropolis web site. Go to [www.atlmetropolis.org](http://www.atlmetropolis.org). Under the “Parishes” tab at the top of the homepage, select “Parish Administration” tab. After the new page loads, select on the right side “2019 Allocation Form” tab. After the new page loads, on the lower right side, under “2019 Documents”, select “Allocation System Manual” tab to download the manual.

The **2019 Allocation Form** has the same format as last year, except that this year both the 2016 and 2017 numbers need to be entered. The 2016 numbers should be the same as the numbers entered in the “2016” column of the final 2018 Allocation Form last year and can be copied and pasted from last year’s final Allocation Form (the Allocation Form following the Metropolis’ review.) Any differences between last year’s 2016 numbers and this year’s 2016 numbers need to be justified on a separate statement. The Metropolis Finance Committee will determine whether or not to accept the updated 2016 numbers.

The list of deductions is *exactly* the same as last year. For further clarification:

#### **1. Donations:**

All donations – Archdiocese, Metropolis, Patriarchate, Local, etc. – are combined and reported on Line 6 of the Allocation Form.

## 2. Eliminated Deductions:

The following deductions have been eliminated:

- a. National and Metropolis Clergy-Laity Conference expenses
- b. Clergy Moving Expenses
- c. Catastrophic Insurance expenses
- d. Metropolis-sponsored P.C. meeting expenses, e.g., Presidents Meeting
- e. Honorarium for Priest serving in the absence of the first Priest

## 3. Fundraising Expense Restrictions:

The following restrictions are applied to the parish's fundraising expense deductions:

- a. Customary Stewardship program expenses are not deductible.
- b. Allocated church expenses such as utilities, security, and insurance, which are not separately measured and tracked are not allowable fundraising deductions.

Please follow the instructions below to complete your **2019 Archdiocese Allocation Form**, which will facilitate the 2019 Archdiocese Allocation process – both at the Metropolis level and the Archdiocese level.

1. Use the attached **2019 Allocation Form** *without any modifications whatsoever* to the format. The EXCEL spreadsheet can be downloaded from the Metropolis website. For any clarifications and comments you may want to add, please attach a separate document.
2. **E-Mail** the completed 2019 Allocation Form – **in Excel format** – and all supporting documents and reports to Mike Missios at [mmissios@aol.com](mailto:mmissios@aol.com) no later April 1, 2018.
3. **Mail the signed 2019 Allocation Form and accompanying financial documents to the Chancellor's Office to be received at the Metropolis no later than April 1, 2018.**
4. A late penalty of up to 10% will be applied for Allocation Forms and supporting documentation received after May 1, 2018.
5. The Allocation Form must be accompanied with the 2017 Income Statement (Profit and Loss) and Balance Sheet. **Without these documents, your Form submission will not be considered complete.**

6. **All Form entries must be traceable to the Income Statement.** If an entry on the Form is not directly traceable to the Income Statement – for example if a Form entry consists of more than one entry in the Income Statement – please include additional documents to explain the source of the number on the Form. If a Form entry is not easily traceable, a claimed deduction may not be allowed.
7. Attach an itemized list of the claimed donations. **Otherwise, the deductions will not be allowed.**
8. Attach an itemized list of claimed capital expenditures. **Otherwise, the deductions will not be allowed.**
9. Refer to the *National Ministries Allocation System Manual* for definitions and clarification of the various line items on the Form.
10. For any questions, contact Mike Missios at 256-694-4819, or email him, [mmissios@aol.com](mailto:mmissios@aol.com)

In His Service,



Michael Missios  
Chairman, Metropolis Finance Committee

Attachment: 2019 Allocation Form

cc: His Eminence Metropolitan Alexios of Atlanta  
Very Rev. Fr. George Tsahakis, Chancellor  
Mr. George Mathews, Metropolis Finance Committee Member  
Mr. George Donkar, Metropolis Finance Committee Member