

## **Assessment Form: January 2025**

#### **Calculated using December'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. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
<ul> <li>Contributions and grants for congregation-based outreach</li> </ul>	7. ()
<ul> <li>Funds for transmittal to other organizations: e.g. UTO, ERI</li> </ul>	)
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:	\$



## **Assessment Form: February 2025**

### **Calculated using January's income**

Congregation:	Town:
Calculating your Assessment:	
Additions (from the previous month):	
<ul> <li>Plate offerings, pledge payments and regular support</li> </ul>	1
<ul> <li>Transfers of income from investments</li> </ul>	2
<ul> <li>Unrestricted gifts, other income</li> </ul>	3
• Rent	4
Subtractions (from the previous month):	
Capital or building funds, gifts and additions	5. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
<ul> <li>Contributions and grants for congregation-based outreach</li> </ul>	7. ()
<ul> <li>Funds for transmittal to other organizations: e.g. UTO, ERD</li> </ul>	)
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)	Ψ <u></u>
Total Enclosed for your January Assessment:	Ψ \$



### **Assessment Form: March 2025**

#### **Calculated using February's income**

Congregation:	Town:
Calculating your Assessment:	
Additions (from the previous month):	
<ul> <li>Plate offerings, pledge payments and regular support</li> </ul>	1
<ul> <li>Transfers of income from investments</li> </ul>	2
<ul> <li>Unrestricted gifts, other income</li> </ul>	3
• Rent	4
Subtractions (from the previous month):	
Capital or building funds, gifts and additions	5. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
<ul> <li>Contributions and grants for congregation-based outreach</li> </ul>	7. ()
<ul> <li>Funds for transmittal to other organizations: e.g. UTO, ERD</li> </ul>	
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:	\$ \$



## **Assessment Form: April 2025**

### **Calculated using March's income**

Congregation:	Town:
Calculating your Assessment:	
Additions (from the previous month):	
<ul> <li>Plate offerings, pledge payments and regular support</li> </ul>	1
<ul> <li>Transfers of income from investments</li> </ul>	2
<ul> <li>Unrestricted gifts, other income</li> </ul>	3
• Rent	4
Subtractions (from the previous month):	
Capital or building funds, gifts and additions	5. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
<ul> <li>Contributions and grants for congregation-based outreach</li> </ul>	7. ()
<ul> <li>Funds for transmittal to other organizations: e.g. UTO, ER</li> </ul>	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:	\$



## **Assessment Form: May 2025**

### **Calculated using April's income**

Congregation:	Town:
Calculating your Assessment:	
Additions (from the previous month):	
<ul> <li>Plate offerings, pledge payments and regular support</li> </ul>	1
<ul> <li>Transfers of income from investments</li> </ul>	2
<ul> <li>Unrestricted gifts, other income</li> </ul>	3
• Rent	4
Subtractions (from the previous month):	
Capital or building funds, gifts and additions	5. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
<ul> <li>Contributions and grants for congregation-based outreach</li> </ul>	7. ()
<ul> <li>Funds for transmittal to other organizations: e.g. UTO, ERD</li> </ul>	
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:	\$ \$



### **Assessment Form: June 2025**

#### **Calculated using May's income**

Congregation:	Town:
Calculating your Assessment:	
Additions (from the previous month):	
<ul> <li>Plate offerings, pledge payments and regular support</li> </ul>	1
<ul> <li>Transfers of income from investments</li> </ul>	2
<ul> <li>Unrestricted gifts, other income</li> </ul>	3
• Rent	4
Subtractions (from the previous month):	
Capital or building funds, gifts and additions	5. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
<ul> <li>Contributions and grants for congregation-based outreach</li> </ul>	7. ()
<ul> <li>Funds for transmittal to other organizations: e.g. UTO, ER</li> </ul>	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)	\$ <u> </u>
Total Enclosed for your January Assessment:	\$



## **Assessment Form: July 2025**

### **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. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
<ul> <li>Contributions and grants for congregation-based outreach</li> </ul>	7. ()
• Funds for transmittal to other organizations: e.g. UTO, ER	D
Discretionary funds, Habitat for Humanity, soup kitchens	8. ()
Tabel Occupios Bassassas (Compatible 4.0)	
Total Operating Revenues (Sum of line 1-8)	\$
Assessment (10% of total operating revenues	\$ <u> </u>
Continuing Education (1% of total operating Revenues)	\$
Total Enclosed for your January Assessment:	\$



## **Assessment Form: August 2025**

#### **Calculated using July's income**

Congregation:	Town:
Calculating your Assessment:	
Additions (from the previous month):	
<ul> <li>Plate offerings, pledge payments and regular support</li> </ul>	1
<ul> <li>Transfers of income from investments</li> </ul>	2
Unrestricted gifts, other income	3
• Rent	4
Subtractions (from the previous month):	
Capital or building funds, gifts and additions	5. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
Contributions and grants for congregation-based outreach	7. ()
<ul> <li>Funds for transmittal to other organizations: e.g. UTO, ERD</li> </ul>	)
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:	\$



## **Assessment Form: September 2025**

### **Calculated using August's income**

Congregation:	Town:
Calculating your Assessment:	
Additions (from the previous month):	
<ul> <li>Plate offerings, pledge payments and regular support</li> </ul>	1
<ul> <li>Transfers of income from investments</li> </ul>	2
<ul> <li>Unrestricted gifts, other income</li> </ul>	3
• Rent	4
Subtractions (from the previous month):	
Capital or building funds, gifts and additions	5. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
<ul> <li>Contributions and grants for congregation-based outreach</li> </ul>	7. ()
<ul> <li>Funds for transmittal to other organizations: e.g. UTO, ERD</li> </ul>	)
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:	* \$



### **Assessment Form: October 2025**

#### **Calculated using September's income**

Congregation:	Town:
Calculating your Assessment:	
Additions (from the previous month):	
<ul> <li>Plate offerings, pledge payments and regular support</li> </ul>	1
<ul> <li>Transfers of income from investments</li> </ul>	2
<ul> <li>Unrestricted gifts, other income</li> </ul>	3
• Rent	4
Subtractions (from the previous month):	
Capital or building funds, gifts and additions	5. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
Contributions and grants for congregation-based outreach	7. ()
• Funds for transmittal to other organizations: e.g. UTO, ERI	
Discretionary funds, Habitat for Humanity, soup kitchens	8. ()
Total Operating Revenues (Sum of line 1-8)	\$ <u> </u>
Assessment (10% of total operating revenues	\$
Continuing Education (1% of total operating Revenues)	\$
Total Enclosed for your January Assessment:	\$



### **Assessment Form: November 2025**

### **Calculated using October's income**

Congregation:	Town:
Calculating your Assessment:	
Additions (from the previous month):	
<ul> <li>Plate offerings, pledge payments and regular support</li> </ul>	1
<ul> <li>Transfers of income from investments</li> </ul>	2
<ul> <li>Unrestricted gifts, other income</li> </ul>	3
• Rent	4
Subtractions (from the previous month):	
Capital or building funds, gifts and additions	5. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
<ul> <li>Contributions and grants for congregation-based outreach</li> </ul>	7. ()
<ul> <li>Funds for transmittal to other organizations: e.g. UTO, ER</li> </ul>	D
Discretionary funds, Habitat for Humanity, soup kitchens	8. ()
Total Operating Povenues (Sum of line 1.9)	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 January Assessment:	\$



### **Assessment Form: December 2025**

#### **Calculated using November's income**

Congregation:	Town:
Calculating your Assessment:	
Additions (from the previous month):	
<ul> <li>Plate offerings, pledge payments and regular support</li> </ul>	1
<ul> <li>Transfers of income from investments</li> </ul>	2
<ul> <li>Unrestricted gifts, other income</li> </ul>	3
• Rent	4
Subtractions (from the previous month):	
Capital or building funds, gifts and additions	5. ()
<ul> <li>Additions to endowment and other investment funds</li> </ul>	6. ()
<ul> <li>Contributions and grants for congregation-based outreach</li> </ul>	7. ()
<ul> <li>Funds for transmittal to other organizations: e.g. UTO, ERD</li> </ul>	)
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:	* \$