

# Tax/Retirement Workshop for Priests -- Diocese of San Diego

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Presenter:  
**Scott A. Hoselton**  
CPA, CDFM, CGMA

**Monday – November 25, 2019**

**10:00 a.m. to 2:30 p.m.**

Pastoral Center, 3888 Paducah Drive  
San Diego, California

## Topics

- ▶ Questions from priests
- ▶ Tax differences between priests/laity
- ▶ “Business” expenses
- ▶ Accountable reimbursement plans
- ▶ Stipends and stole fees
- ▶ Sample tax calculations
- ▶ Audits
- ▶ Taxable and nontaxable “gifts”
- ▶ Taxable and nontaxable “allowances”
- ▶ Value of room and board
- ▶ Tax on pension benefits
- ▶ Taxes on Social Security benefits
- ▶ Tax aspects of retirement saving
- ▶ Long Term Care likelihood of need and responsibility
- ▶ Tax Reform and Priests – More changes for 2019 and beyond

Shepherds Advisor is an organization designed to assist bishops and priests in tax, finance, governance and management matters. The principal of Shepherds Advisor, Scott A. Hoselton, has been providing these services to and for clergy for 32 years.

- Finance Officer, Diocese of Fargo – 1988
  - Certified Public Accountant – 1988
  - Certified Diocesan Fiscal Manager – 2010
  - Chartered Global Management Account – 2012
  - Have served three Diocesan Bishops and one Apostolic Administrator
  - Diocesan Fiscal Management Conference Board 1996-2002
  - Catholic Umbrella Pool II Executive Board 2010-2017; President 2016-2017
  - Articles for *The Priest* and *Deacon Digest*
  - Conducted Church Governance & Leadership Workshops since 1998
  - Recipient of the *Pro Ecclesia et Pontifice* award from Pope John Paul II – 2001
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