

Fruit IN ITS SEASON WEALTH MANAGEMENT

-  **Client:** Suburbia Church
-  **Location:** South-Central Connecticut
-  **Engagement Date:** September 2025
-  **Services Provided:** Housing Allowance Education, Policy Development, Board Consultation, CPA Services, Compliance Review

Our Assessment

We conducted a comprehensive review that included:

- ✓ Pastor's compensation package
- ✓ Existing housing allowance resolutions
- ✓ Housing expenses
- ✓ Holistic retirement planning
- ✓ Payroll practices

The Solution

Working alongside church leadership, we helped implement a complete housing allowance strategy.

Our services included:

- ✓ Educated the church board on IRS housing allowance rules
- ✓ Provided a sample board resolution for adoption
- ✓ Educated the pastor and church Treasurer on proper payroll taxation required for pastors
- ✓ Connected the pastor with a CPA who works exclusively with churches and pastors.



The Results

Following implementation:

- ✓ Housing allowance board resolution was properly designated before the applicable tax year.
- ✓ Church leadership confidence that payroll procedures follow IRS rules.
- ✓ Accurate payroll reporting around SECA/FICA.
- ✓ Developed a comprehensive, personalized retirement plan designed to help the pastor and his wife confidently prepare for their long-term financial future.

Client Testimonial

"Before working with Aston Blake, we didn't fully understand how minister's housing allowance worked. Our board now has confidence that our process and payroll is properly documented, compliant, and beneficial to our pastor. Aston and his team have also been a blessing by putting together a comprehensive retirement plan for my wife and I."

— Lead Pastor