



REQUEST FOR EXEMPTION FROM ASSESSMENT

POLICY FOR EXEMPTION OF MONEY USED TO BUILD OR RENOVATE

Please read this page before completing the application on the following page.

- A. Eligible exemptions are for new buildings or major renovations/building additions that include the replacement or upgrade of major systems and extend the useful life of a building or structure. Examples of major renovations include demolition of the interior or exterior of a building or material portion thereof, including the removal and subsequent replacement of electrical, plumbing, heating, ventilating and air conditioning systems, fixed equipment and interior walls and partitions.
- B. All such exemptions would warrant a special campaign or fund drive (brochures, pledge cards, pledge periods, etc.).
- C. Routine maintenance expenses (roofs, windows, heating/air conditioning systems, repaving parking lots, flooring, carpets, appliances) will not be considered for exemption unless they are part of a major renovation or building addition. Routine maintenance expenses are recurring and customary and can be costly, but do not extend the life of the underlying asset nor increase its usefulness.
- D. The exempt project must have specific beginning and ending dates for collection of the money, not to exceed five years.
- E. The exemption requested cannot exceed the cost of the project.
- F. All exempt money collected for the special campaign or fund drive must be used for the specified project. *If a parish chooses to use interest gained from an Exempted Project Fund for the "Fund Goal", the said interest is not to be assessed. (3-22-2016)*
- G. The amount to be exempt will be the lesser of the amount collected or the amount specified as the total fund goal.
- H. Exempt money must be *new revenue*, accounted for in the revenue of the Operating Fund. Money will be exempted only in the year it is collected. Money collected prior to beginning the project must be deposited with the Diocese until needed.
- I. An exemption will NOT be considered once work has begun or is completed.
- J. See [Building Projects](#) for the construction approval process.

REQUEST FOR EXEMPTION FROM ASSESSMENT

PARISH REQUESTING EXEMPTION:

Name

Address

CHECK WHICH CRITERIA THIS REQUEST FOR EXEMPTION MEETS:

- New Building Project Major Renovation or Building Addition

CHECK WHICH CRITERIA THIS REQUEST FOR EXEMPTION MEETS:

- Campaign has a three-year pledge period Campaign has a five-year pledge period

CHECK WHICH CAMPAIGN METHOD(S) WILL BE USED TO SOLICIT CONTRIBUTIONS:

- Mailing with a letter, brochure, and pledge card In Pew Consultant

- Phonathon Door to Door Special dinners or gatherings

GENERAL DESCRIPTION OF PROJECT (OR ATTACHED DESCRIPTION):

TOTAL FUND GOAL (AMOUNT OF DOLLARS TO BE EXEMPTED): \$ _____

PROJECTED COST OF PROJECT: \$ _____

STARTING DATE FOR COLLECTION OF FUNDS: ____/____/____

ENDING DATE FOR COLLECTION OF FUNDS: (NOT TO EXCEED FIVE YEARS) ____/____/____

*This request must clearly fit the policy set forth on the front of this form.
No adjustment to assessment will be considered unless this exemption is on file and approved by the Parish Finance Council and the Bishop at the time the assessment is computed.*

PASTOR SIGNATURE

DATE

PARISH BUSINESS MANAGER SIGNATURE

DATE

Reviewed by Parish Finance Council:

PARISH FINANCE COUNCIL CHAIR SIGNATURE

DATE

APPROVED BY:

BISHOP'S SIGNATURE

DATE