



Evangelical Lutheran Church in America

God's work. Our hands.

Annual FISCAL AGENT Checklist

Year _____

Mission Developer Name: _____

Fiscal Agent Name: _____

Phone number: _____ E-mail: _____

Status: Ordained Clergy/Lay/Rostered Lay _____

Start date: _____

Item	Yes
Background Check cleared by ELCA Human Resources	<input type="checkbox"/>
Fiscal Agent Agreement signed & forwarded to DMU	<input type="checkbox"/>
Appointment Letter created, signed by fiscal agent, developer & forwarded to DMU	<input type="checkbox"/>
Completed I-9 in employee file (Complete form within 72 hours of hire)	<input type="checkbox"/>
W-4 in employee file, if requested. Filed (Complete form within 72 hours of hire)	<input type="checkbox"/>
Developer included on Workers Compensation policy Insurance Company _____ Policy Number _____ Effective from _____ to _____	<input type="checkbox"/>
Unemployment Insurance acquired (Oregon only)	<input type="checkbox"/>
Current Housing Allowance form received and accepted (clergy)	<input type="checkbox"/>
Portico Benefit Services commitments kept current Health Insurance, Pension, & Disability	<input type="checkbox"/>



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Mission Support forms received from ministry (if fiscal agent forwarding benevolence)	<input type="checkbox"/>
Salary Contributions forms received from ministry	<input type="checkbox"/>
Letters of Intent from Mission Founders in-hand	<input type="checkbox"/>
List of Mission Founders:	
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
Quarterly 941 to include financial information for Developer as appropriate	<input type="checkbox"/>
Annual W-2 provided by January 31, each year, in keeping with local, state, and federal requirements.	<input type="checkbox"/>

Person completing form:

Name: _____ E-mail: _____

Address: _____

City _____ State: _____ Zip code: _____

Phone number: _____ Date: _____

Copy to: Mission Developer
 Director for Evangelical Mission
 Human Resources
 Domestic Mission Unit of the ELCA