



Memo

Date: January 30, 2023
To: All pastors, parish administrators and business managers
From: Brad Wilson, chief financial officer, Office of Finance
Re: Update on Employee Retention Credits

Our parishes have been receiving emails and phone calls from organizations offering to assist them in applying for Employee Retention Credits (ERC). In October of 2021, I published a memo stating that parishes could not apply for the credits because, under “affiliation” or “aggregation” rules, our employee count was over 500 thereby making all parishes ineligible.

Recently, our attorneys researched further and found that neither of the provisions applied to our parish corporations, and therefore each parish may apply individually. The value of the credits is a function of payroll costs. For parishes with a small number of employees, the credits may not be worth the effort of the application. Your treasurer and parish finance council are best to provide you with a recommendation on whether or not pursue ERC.

Ian Trutt, our paralegal, will soon send out an electronic board resolution for each pastor to execute. This resolution will authorize the president (pastor) and the treasurer to take any actions necessary to apply for the ERC.

To date, St. Brigid parish completed its application. St. Ann and St. Jude are beginning the process.

Your sister parishes can provide insight into the application process. I list the firms they used below. Each parish decides which firm to use and is not limited to these:

St. Brigid CLA- CliftonLarsonAllen

Alex Hengel
alex.hengel@claconnect.com

St. Ann Synergi Partner
Joe Outlaw (really)
joutlaw@synergipartners.com

St. Jude Jones & Kolb
Bliss Jones
gbj@joneskolb.com