

Client name _____

TAX PROJECTION INFORMATION WORKSHEET

Please fill out all applicable information. **If necessary, estimate or project information to December 31.**

	<u>\$ To date</u> <u>Gross Amt</u>	<u>\$ To date</u> <u>Fed WH tax</u>	<u>\$ To date</u> <u>State WH tax</u>	<u>\$ Estim 12.31</u> <u>Gross Amt</u>	<u>\$ Estim 12.31</u> <u>Fed tax WH</u>	<u>\$ Estim 12.31</u> <u>State tax WH</u>
Salaries and Wages:						
Taxpayer	_____	_____	_____	_____	_____	_____
Spouse	_____	_____	_____	_____	_____	_____
IRA and pension distributions:						
Taxpayer	_____	_____	_____	_____	_____	_____
Spouse	_____	_____	_____	_____	_____	_____
Social Security (gross):						
Taxpayer	_____	_____	_____	_____	_____	_____
Spouse	_____	_____	_____	_____	_____	_____

	<u>Taxpayer</u>	<u>Spouse</u>
Business income	_____	_____
Rents (Schedule E)	_____	_____

Please list any estimated tax payments made:

Federal:			State:		
Date	_____	Amount	_____	Date	_____
Date	_____	Amount	_____	Date	_____
Date	_____	Amount	_____	Date	_____
Date	_____	Amount	_____	Date	_____

INVESTMENT INFORMATION -- THIS CAN BE OBTAINED FROM YOUR INVESTMENT ADVISOR --

If necessary, estimate or project information to December 31.

Capital gains and losses:

Short-term _____

Long-term _____

Interest and dividend income _____

Capital gain distributions _____

Please list any other important information that may affect your tax projection: _____
