

**Client Tax Withholding Worksheet Year:** \_\_\_\_\_

Please complete to the best of your ability. If you do not know or it does not apply to you, please leave it blank.

Taxpayer 1 (TP1): \_\_\_\_\_

Taxpayer 2 (TP2): \_\_\_\_\_

Previous Tax Year	Estimates for This Year			
	TP 1	TP 2	TP 1	TP 2
<b>INCOME</b>				
Wages (Line 1)	_____	_____	_____	_____
Interest (Line 2b)	_____	_____	_____	_____
Dividends (Line 3b)	_____	_____	_____	_____
IRA/Pension (Line 4b)	_____	_____	_____	_____
SS Income (Line 5a)	_____	_____	_____	_____
Capital Gains (Sch1,L13)	_____	_____	_____	_____
Capital Gains (Sch1, L14)	_____	_____	_____	_____
Taxable Alimony*	_____	_____	_____	_____
Self-Employed (Sch C Line 31)	_____	_____	_____	_____
Self-Employed (Sch C Line 31)	_____	_____	_____	_____
Self-Employed (Sch C Line 31)	_____	_____	_____	_____
Rental (Sch E line 26)	_____	_____	_____	_____
Rental (Sch E line 26)	_____	_____	_____	_____
Other Income	_____	_____	_____	_____
Other Income	_____	_____	_____	_____

**DEDUCTIONS/CREDITS (totals)**

**DEDUCTIONS/CREDITS**

Student Loan Interest	_____	_____
# of Children under 17	_____	_____
# of Children in school over 17	_____	_____
Daycare Expenses	_____	_____
Alimony Paid*	_____	_____
College Tuition Payments	_____	_____
Mortgage Interest	_____	_____
State Income Tax	_____	_____
Property Taxes	_____	_____
Charitable Donations	_____	_____

\* Do not include alimony if your divorce was final after 12/31/2018

**For Tax Preparer Use:**

Taxable Income	_____
Standard or Itemized Ded	_____
Child Credits	_____
Tuition Credits	_____
QBI	_____
Estimated Fed Tax Liab	_____

**Current Paystubs**

Taxpayer 1	Current W4	Exemptions?	Taxpayer 1	Current W4	Exemptions?
Job 1	Single?	_____	Job 2	Single?	_____
	Married?	_____		Married?	_____
How often are you paid?					
Gross Earnings Per Period					
Pretax Medical Insurance					
Pretax 401k contributions					
Pretax other					
Federal Tax Per Period					
State Tax Per Period					
Anticipated Bonus \$					
	Current W4	Exemptions?		Current W4	Exemptions?
Taxpayer 2	Single?	_____	Taxpayer 2	Single?	_____
Job 1	Married?	_____	Job 2	Married?	_____
How often are you paid?					
Gross Earnings Per Period					
Pretax Medical Insurance					
Pretax 401k contributions					
Pretax other					
Federal Tax Per Period					
State Tax Per Period					
Anticipated Bonus \$					

Have you or are you planning to make any estimated tax payments for the current tax year?

1st quarter \_\_\_\_\_ 3rd quarter \_\_\_\_\_  
 2nd quarter \_\_\_\_\_ 4th quarter \_\_\_\_\_

**For Tax Preparer Use:**

**Fed Liability**  
**Fed Withholding**

**Adjustments recommended:**