NASH BUSINESS SERVICES, INC. *Tax* Income /Payroll/Sales/Bookkeeping/Business License Prep

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TAX-PLANNING WORKSHEET

Client ______________________

Year ______________________

Date ____________ **By** ____________

TO THE CLIENT This worksheet is given as a planning aid. Remember - all figures are estimates. If there are significant changes please call so the estimate can be re-done.

Plan for ________	________	________	________
INCOME			
Wages - Taxpayer			
- Spouse			
Interest			
Dividends			
State Tax Refund			
Business (Sch C)			
Gain/Loss (Sch D)			
Pensions			
Sch E Passive			
Rental			
Other			
Soc Sec ________			
Other ________			
TOTAL INCOME			
ADJUSTMENTS			
IRA Contrib	( )	( )	( )
SEP/Keogh etc	( )	( )	( )
SE Health Ins	( )	( )	( )
Other ________	( )	( )	( )
________	( )	( )	( )
ADJ GROSS INC			
Deductions	( )	( )	( )
Exemptions	( )	( )	( )
TAXABLE INC			
INCOME TAX			
Credits ________	( )	( )	( )
________	( )	( )	( )
S/E Tax			
Other ________			
NET TAX			
Less: Payments	( )	( )	( )
ANTICIPATED			
REFUND ☺			
TAX DUE ☹			
TAX BRACKET			

ITEMIZED DEDUCTIONS			
Net Medical			
Taxes			
Income & SDI			
Property			
Vehicle			
Oth ________			
Interest			
Mortgage			
Investment			
Oth ________			
Contrib: Cash			
Non-cash			
2%: Tax Prep			
Job expenses			
Form 2106			
Investment			
Oth ________			
2% Floor	( )	( )	( )
Full: Gambling			
Oth ________			
TOTAL			
or Standard Ded			
DEDUCTIONS			
3%/80% limit	( )	( )	( )
Net Deductions			

PAYMENTS			
Withhold - T/P			
- Spouse			
Estimates			
Other ________			
TOTAL			