

# Year-End Tax Plan

[Name]

[Date]

Gross Income	Actual	Estimated	
	To Date	To Year End	Full Year
Taxable wages/salaries			
Taxable dividends and interest			
Net business income (loss)			
Net capital gain (loss)			
Net rent income (loss)			
Net partnership income (allowable loss)			
Other income (loss)			
Total Gross Income			
Adjustments to Gross Income	Actual	Estimated	
	To Date	To Year End	Full Year
Alimony paid			
IRA payments			
Keogh plan payments			
Other adjustments			
Total Adjustments			
Adjusted Gross Income			
Allowable Itemized Deductions	Actual	Estimated	
	To Date	To Year End	Full Year
Medical			
Taxes			
Mortgage interest paid			
Charitable contributions			
Casualty and theft losses			
Unreimbursed moving expenses			
Unreimbursed employee business expenses			
Miscellaneous deductions			
Total Itemized Deductions			
Standard deduction			
Greater of itemized or standard deduction			
Value of exemptions			
Number of allowable exemptions			
Total Deductions and Exemptions			
Taxable income			
Tax bracket			
Targeted taxable income			
Targeted tax bracket			