**Tax Projection Checklist**

In order for us to prepare your Tax Projection, please provide the following information:

* Current Paystubs
* Real Estate Tax Bill
* Mortgage Interest statement
* Charitable Contributions
* Withholding Statements from Pensions, IRAs, etc
* Copy of last year’s tax return (if we did not prepare)
* Please inform us of the following:
	+ Change in marital status
	+ Number of dependents
	+ Change in investment income
	+ Alimony payments / income
	+ Business Income

**Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please forward the above information, any other pertinent statements/documents, and this checklist to the office as soon as possible. Thank You!

Laura M. Mraz, EA / Chris M. Spaethe, EA

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