**Tax Projection Checklist**

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

* Current Paystubs – showing current and YTD earnings and withholdings
* Information regarding early withdrawals from retirement accounts (amount, taxes withheld)
* Please inform us of the following:
	+ Change in marital status
	+ Number of dependents
	+ Change in investment income
	+ Alimony payments / income
	+ Business Income
* Any other information requested by the tax team

**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!

The Tax Team at LMM & Associates

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