

Year-End Tax Plan

[Name]

[Date]

Actual To Date	Estimated To Year End	Estimated Full Year
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GROSS INCOME

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)		
<i>TOTAL Gross Income</i>		

ADJUSTMENTS TO GROSS INCOME

Alimony paid		
IRA payments		
Keogh plan payments		
Other adjustments		
<i>TOTAL Adjustments</i>		

ADJUSTED GROSS INCOME

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ALLOWABLE ITEMIZED DEDUCTIONS

Medical		
Taxes		
Mortgage interest paid		
Charitable contributions		
Casualty and theft losses		
Unreimbursed moving expenses		
Unreimbursed employee business expenses		
Miscellaneous deductions		
<i>TOTAL Itemized Deductions</i>		

Standard deduction		
Greater of itemized or standard deduction		
Value of exemptions		
Number of allowable exemptions		
<i>TOTAL Deductions and Exemptions</i>		

Taxable income	
Tax bracket	
Targeted taxable income	
Targeted tax bracket	