

Name : \_\_\_\_\_ Date : \_\_\_\_\_

# INDIVIDUAL TAX PLANNING

## 1. Basic Info

Filing Status

Dependents


## 2. Income

Wages

Business / Freelance

Other Income

Total Income:


## 3. Deductions

Standard OR Itemized

Total Deductions:


## 4. Taxable Income

Total Income – Deductions =

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## 5. Credits

Child / Education / Other

Total Credits:


## 6. Tax

Estimated Tax

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## 7. Payments

Withholding

Estimated Payments

Total Payments:


## 8. Result

Refund or Amount Owed:

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