

TAX PROJECTION INFORMATION REQUEST

Name of your business: _____ Today's Date: _____

Please provide us with the following information for the preparation of your annual income tax planning:

1. Copy of most current pay stubs for the year. If you have more than one employer this year, include the last pay stub for each employer. _____
2. Current backup of your accounting system. _____
 - Can we project the income/expenses for the remainder of the year based upon your current income and expenses? _____
 - If not, what changes do you anticipate? _____
3. Estimated tax payments. Please list the payments you have made so far this year:
 - Federal 1st qtr _____, 2nd qtr _____, 3rd qtr _____ 4th qtr _____
 - State (____) 1st qtr _____, 2nd qtr _____, 3rd qtr _____ 4th qtr _____
 - State (____) 1st qtr _____, 2nd qtr _____, 3rd qtr _____ 4th qtr _____
4. Do you expect to have the same interest income, dividends or capital gains as last year? _____ Please detail any changes. _____
5. Change in marital status, dependents? _____ If so, please detail _____
6. List any other material changes from prior year - Distributions from a retirement plan, contributions to retirement plan, change in mortgage interest, real estate taxes, charity, rental income, etc. _____
7. Retirement plan – Current type of plan _____ Additional amount you wish to contribute to for this tax year? Taxpayer _____ Spouse _____ Employees _____

Do you have any questions or information that we need to address? Please list them so we can address them for you. _____

Thank you for your assistance in this process. Please contact the office at (704) 544-7600 with any questions you have about the information requested.