## VastSolutionsGroup.com taxPREDICTOR+ powered by EINSTEIN ESTIMATED TAX (DUE)/REFUND INSTRUCTIONS TAX YEAR 2023

This spreadsheet is designed to give us the data to do an estimated balance due or refund for your tax year 2023 Federal and State (if applicable) taxes.

This spreadsheet allows us to do a very simplified tax calculation. The data input does not consider all income, and expense items. To determine the exact tax due or refund, please contact us for additional services.

Round all numbers to the nearest dollar.

Taxpayer Name:

All data, except W-2's, is to be input in total. For example, if you have received three 1099-INT interest income documents, input the total for these, not individual amounts. W-2's are to be input individually.

You will receive no communication from us except the balance due/refund calculation or questions concerning the data you have supplied.

Turn-around-time is within 1 week as of the receipt of the data sheet.

## VastSolutionsGroup.com

## taxPREDICTOR+ powered by EINSTEIN ESTIMATED TAX (DUE)/REFUND TAX YEAR 2023

Email:

Phone

Number:

							(###-##	##-####)
GENEF	RAL						DEPENDENTS	3
Date of Birth:						Child1 DOB:		
		(mm/dd/yy)		1				(mm/dd/yy)
Filing Status (select from drop-down menu):				]		Child2 DOB:		(mm/dd/yy)
In what state did you live in 20222						Child3 DOB:		(пплаа/уу)
In what state did you live in 2023?						Culias DOB:		(mm/dd/yy)
In what other states did you work du	ring 2023?					Child4 DOB:		
,	g							(mm/dd/yy)
What is your spouse's DOB?						Child5 DOB:		
		(mm/dd/yy)						(mm/dd/yy)
T4 V V F 4 D 0000 F 0 T 114 4 T	ED TAY DAYA	-NTO /						
TAX YEAR 2023 ESTIMAT	ED IAX PAYM	ENTS (paid in 202	23 or after)_		det (len Men)		RTER	4th (Oct-Dec)
What <u>FEDERAL</u> 2023 estimated tax payments did you pay each quarter?					1st (Jan-Mar)	2nd (Apr-Jun) \$	3rd (July-Sept)	\$
What FEDERAL 2023 Collinated tax	payments did ye	ou pay cacii quai			LΨ	Ψ	Ψ	Ψ
What <b>STATE</b> 2023 estimated tax payments did you pay each quarter?					\$	\$	\$	\$
			INDIVIDUAL I	NOOME				
	NCOME	W-2 WITHHOLDING						
	W-2 WAGES				Social			
Fundamen Name	Wages, Tips	Social Security Box 3	Medicare Box 5		Federal Box 2	Security Box 4	Medicare Box 6	State Box 17
Employer Name	(Box 1 + Box 7)	\$	\$	1	\$	\$	\$	\$
	Ψ	Ψ	Ψ	ı	Ι Ψ	Ψ	Ψ	Ψ
	\$	\$	\$	]	\$	\$	\$	\$
				•				
	\$	\$	\$		\$	\$	\$	\$
			•	1				
	\$	\$	\$	l	\$	\$	\$	\$
			NET INCOME					NET INCOME
			(EXPENSE)	1				(EXPENSE)
Proprietorship income in 2023:			\$		Rental income	in 2023:		\$

		FORM K-1 PA	RTNERSHIP				
	BOX 1	BOX 2	BOX 3	BOX 5	BOX 6A	BOX 9A	BOX 12
Partnership1 Income:	\$	\$	\$	\$	\$	\$	\$
	BOX 1	BOX 2	BOX 3	BOX 5	BOX 6A	BOX 9A	BOX 12
Partnership2 Income:	\$	\$	\$	\$	\$	\$	\$
	BOX 1	BOX 2	BOX 3	BOX 5	BOX 6A	BOX 9A	BOX 12
Partnership3 Income:	\$	\$	\$	\$	\$	\$	\$
		ORM K-1 SUB S		_			
Sub S Entity1 Income:	BOX 1	BOX 2	BOX 3	BOX 4	BOX 5A	BOX 8A	BOX 11
out of Lindy I meeting.	<b>.</b>	1 4	, <del>,</del>	1 4	1 *	_   ¥	1 4
Sub S Entity2 Income:	BOX 1	BOX 2	BOX 3	BOX 4	BOX 5A	BOX 8A	BOX 11
oub 3 Entity2 income.	Ψ	φ	Ψ	Ψ	Ψ	_   Φ	Φ
o k o Full o leaves	BOX 1	BOX 2	BOX 3	BOX 4	BOX 5A	BOX 8A	BOX 11
Sub S Entity3 Income:	\$	\$	\$	\$	\$	\$	\$
2023 Interest Income (all 1099-INTs):	\$			Pension/Annu	uity Distribution	Income:	\$
2023 Dividend Income (all 1099-DIVs):	\$			Social Securi	ty Beneficiary In	come:	\$
2023 IRA Income:	\$			Alimony recei	ived in 2023		\$
2023 1099 Income (all 1099-MISCs):	\$			HSA/Long-Te	rm Care Reimb	ursements:	\$
	\$			All other inco	me:		\$
		CAPITAL DATE ACQ'E			COST \$		
2023 Short-term sales gains:		DATE ACQ'E	DATE SOLD	SALES	cost		
2023 Short-term sales gains:		(mm/dd/yy)	(mm/dd/yy)	SALES \$	COST \$		
2023 Short-term sales gains: 2023 Long-term sales gains:		(mm/dd/yy) (mm/dd/yy)	(mm/dd/yy)	SALES \$	COST \$	REDITS_	e
2023 Short-term sales gains: 2023 Long-term sales gains:		(mm/dd/yy)	(mm/dd/yy)	SALES \$	COST \$	REDITS	\$
2023 Short-term sales gains: 2023 Long-term sales gains: Partnership loss carryover from 2022:		(mm/dd/yy) (mm/dd/yy)	(mm/dd/yy)	SALES \$	COST \$	REDITS	\$
2023 Short-term sales gains: 2023 Long-term sales gains: Partnership loss carryover from 2022:		(mm/dd/yy) (mm/dd/yy)	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$		
2023 Short-term sales gains: 2023 Long-term sales gains: Partnership loss carryover from 2022: 6 Corp loss carryover from 2022:		(mm/dd/yy) (mm/dd/yy)	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece		\$
2023 Short-term sales gains: 2023 Long-term sales gains: Partnership loss carryover from 2022: S Corp loss carryover from 2022:		(mm/dd/yy) (mm/dd/yy)	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Cash Income: 2023 Short-term sales gains: 2023 Long-term sales gains: 2024 Long-term sales gains: 2025 Long-term sales gains: 2026 Long-term sales gains: 2026 Long-term sales gains: 2027 Long-term sales gains: 2028 Long-term sales gains: 2029 Long-term sales gains: 2029 Long-term sales gains: 2029 Long-term sales gains: 2020 Long-term sales gains: 2020 Long-term sales gains: 2021 Long-term sales gains: 2022 Long-term sales gains: 2022 Long-term sales gains: 2023 Long-term sales gains: 2024 Long-term sales gains: 2025 Long-term sales gains: 2026 Long-term sales gains: 2027 Long-term sales gains: 2028 Long-term sales gains: 2029 Long-term sales gains: 2029 Long-term sales gains: 2020 Long-term sales gains: 2020 Long-term sales gains: 2021 Long-term sales gains: 2022 Long-term sales gains: 2022 Long-term sales gains: 2023 Long-term sales gains: 2024 Long-term sales gains: 2025 Long-term sales gains: 2026 Long-term sales gains: 2026 Long-term sales gains: 2027 Long-term sales gains: 2028 Long-t		(mm/dd/yy) (mm/dd/yy)	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Short-term sales gains: 2023 Long-term sales gains:  Partnership loss carryover from 2022:  S Corp loss carryover from 2022:  ITEMIZED DEDUCT Total 2023 Medical & Dental annual spending:  Total 2023 Medical insurance annual cost:		(mm/dd/yy)  (mm/dd/yy)  \$ \$	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Short-term sales gains: 2023 Long-term sales gains:  Partnership loss carryover from 2022:  S Corp loss carryover from 2022:  ITEMIZED DEDUCT  Total 2023 Medical & Dental annual spending:		(mm/dd/yy)  (mm/dd/yy)  \$  \$  \$	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Short-term sales gains: 2023 Long-term sales gains: 2024 Long-term sales gains: 2024 Long-term sales gains: 2025 Long-term sales gains: 2026 Long-term sales gains: 2026 Long-term sales gains: 2026 Long-term sales gains: 2027 Long-term sales gains: 2028 Long-term sales gains: 2028 Long-term sales gains: 2028 Long-term sales gains: 2029 Long-term sales gains: 2029 Long-term sales gains: 2020 Long-term sales gains: 2		(mm/dd/yy)  (mm/dd/yy)  \$ \$	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Short-term sales gains: 2023 Long-term sales gains: 2024 Long-term sales gains: 2024 Long-term sales gains: 2025 Long-term sales gains: 2026 Long-term sales gains: 2026 Long-term sales gains: 2026 Long-term sales gains: 2027 Long-term sales gains: 2028 Long-term sales gains: 2028 Long-term sales gains: 2029 Long-term sales gains: 2020 Long-term sales gains: 2020 Long-term sales gains: 2020 Long-term sales gains: 2021 Long-term sales gains: 2022 Long-term sales gains: 2023 Long-term sales gains: 2024 Long-term sales gains: 2026 Long-term sales gains: 2026 Long-term sales gains: 2027 Long-term sales gains: 2028 Long-term sales gains: 2028 Long-term sales gains: 2028 Long-term sales gains: 2028 Long-term sales gains: 2029 Long-term sales gains: 2029 Long-term sales gains: 2020 Long-term sales gains: 2020 Long-term sales gains: 2020 Long-term sales gains: 2021 Long-term sales gains: 2022 Long-term sales gains: 2023 Long-term sales gains: 2024 Long-term sales gains: 2026 Long-term sales gains: 2026 Long-term sales gains: 2027 Long-term sales gains: 2028 Long-term sales gains: 2		(mm/dd/yy)  (mm/dd/yy)  \$  \$  \$	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Short-term sales gains: 2023 Long-term sales gains: 2023 Corp loss carryover from 2022: 2023 Medical & Dental annual spending: 2023 Medical insurance annual cost: 2023 Medical miles annual total: 2023 Medical miles annual total: 2023 Medical miles annual total: 2024 Medical miles annual total: 2025 Medical miles annual total: 2026 Medical miles annual total: 2027 Medical miles annual total: 2028 Medical miles annual total: 2029 Medical miles annual total: 2029 Medical miles annual total: 2020 Medical miles annual total: 2021 Medical miles annual total: 2023 Medical miles annual total: 2023 Medical miles annual total: 2024 Medical miles annual total: 2025 Medical miles annual total: 2026 Medical miles annual total: 2027 Medical miles annual total: 2028 Medical miles annual total: 2029 Medical miles annual total: 2029 Medical miles annual total: 2020 Medical miles annual total: 2021 Medical miles annual total:		Mart AcQ't	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Short-term sales gains: 2023 Long-term sales gains: 2023 Corp loss carryover from 2022: 2023 Medical & Dental annual spending: 2023 Medical insurance annual cost: 2023 Medical miles annual total: 2023 Medical miles annual total: 2023 Medical miles annual total: 2024 Medical miles annual total: 2025 Medical miles annual total: 2026 Medical miles annual total: 2027 Medical miles annual total: 2028 Medical miles annual total: 2029 Medical miles annual total: 2029 Medical miles annual total: 2020 Medical miles annual total: 2021 Medical miles annual total: 2023 Medical miles annual total: 2023 Medical miles annual total: 2024 Medical miles annual total: 2025 Medical miles annual total: 2026 Medical miles annual total: 2027 Medical miles annual total: 2028 Medical miles annual total: 2029 Medical miles annual total: 2029 Medical miles annual total: 2020 Medical miles annual total: 2021 Medical miles annual total:		(mm/dd/yy)	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Short-term sales gains: 2023 Long-term sales gains: 2023: 2023 Long-term sales gains: 2023: 2024: 2025 Long-term sales gains: 2026: 2026 Long-term sales gains: 2027: 2028 Long-term sales gains: 2028 Long-term sales gains: 2029 Long-term sales gains: 2029 Long-term sales gains: 2029 Long-term sales gains: 2020 Long-term sales gains:		Mart AcQ't	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Short-term sales gains: 2023 Long-term sales gains: 2023 Long-term sales gains:  Partnership loss carryover from 2022: S Corp loss carryover from 2022:  ITEMIZED DEDUCT  Total 2023 Medical & Dental annual spending:  Total 2023 Medical insurance annual cost:  Total 2023 Prescription drugs annual total: 2023 Medical miles annual total:  Amount paid for 2022 state income taxes:  Total 2023 Real Estate taxes paid (Form 1098):  Total 2023 Personal Property taxes paid:		\$ \$ \$ \$ \$ \$ \$	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Short-term sales gains: 2023 Long-term sales gains: 2023 Long-term sales gains: 2023 Long-term sales gains: 2023 Long-term sales gains: 2023 Partnership loss carryover from 2022: 2023 Medical & Dental annual spending: 2023 Medical insurance annual cost: 2023 Medical miles annual total:		Mart AcQ't	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$
2023 Short-term sales gains: 2023 Long-term sales gains:  Partnership loss carryover from 2022:  S Corp loss carryover from 2022:  ITEMIZED DEDUCT  Total 2023 Medical & Dental annual spending:  Total 2023 Medical insurance annual cost:		\$ \$ \$ \$ \$ \$ \$	(mm/dd/yy)	SALES \$  Fuel efficience Child Care ar	COST \$  \$  CF  y vehicle cost:  nual cost:  nergy credit rece	eived:	\$