

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.

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.

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TAX YEAR 2023

Taxpayer Name:		Email:		Phone Number:	
(###-###-####)					

<u>GENERAL</u>	<u>DEPENDENTS</u>
Date of Birth: <input style="width: 80%;" type="text"/> <small>(mm/dd/yy)</small>	Child1 DOB: <input style="width: 80%;" type="text"/> <small>(mm/dd/yy)</small>
Filing Status (select from drop-down menu): <input style="width: 80%;" type="text"/>	Child2 DOB: <input style="width: 80%;" type="text"/> <small>(mm/dd/yy)</small>
In what state did you live in 2023? <input style="width: 80%;" type="text"/>	Child3 DOB: <input style="width: 80%;" type="text"/> <small>(mm/dd/yy)</small>
In what other states did you work during 2023? <input style="width: 80%;" type="text"/>	Child4 DOB: <input style="width: 80%;" type="text"/> <small>(mm/dd/yy)</small>
What is your spouse's DOB? <input style="width: 80%;" type="text"/> <small>(mm/dd/yy)</small>	Child5 DOB: <input style="width: 80%;" type="text"/> <small>(mm/dd/yy)</small>

<u>TAX YEAR 2023 ESTIMATED TAX PAYMENTS</u> (paid in 2023 or after)	<u>QUARTER</u>			
	1st (Jan-Mar)	2nd (Apr-Jun)	3rd (July-Sept)	4th (Oct-Dec)
What FEDERAL 2023 estimated tax payments did you pay each quarter?	\$	\$	\$	\$
What STATE 2023 estimated tax payments did you pay each quarter?	\$	\$	\$	\$

<u>INDIVIDUAL INCOME</u>								
	<u>W-2 WAGES</u>			<u>W-2 WITHHOLDING</u>				
	Employer Name	Wages, Tips (Box 1 + Box 7)	Social Security Box 3	Medicare Box 5	Federal Box 2	Social Security Box 4	Medicare Box 6	State Box 17
	\$	\$	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$	\$	\$

	NET INCOME (EXPENSE)		NET INCOME (EXPENSE)
Proprietorship income in 2023:	\$	Rental income in 2023:	\$

