

Estimated Taxes and Form W-4 Worksheet

Name: _____
SSN: _____

Choose the Method You Will Use to Pay Your 2018 Federal Income Taxes
 By withholding from my paychecks. (You will also need to complete the **Additional Information for Form W-4 Worksheet**. QuickZoom below.)
 By making estimated tax payments. If estimated payments are in addition to withholding, my estimated 2018 withholding will be _____
 Overpayment from my 2017 return. _____
 Amount of my 2017 overpayment to apply to 2018 instead of refunding it _____

Enter Your Filing Status and Other Information for Your 2018 Tax Return
 Choose your filing status _____
 Taxpayer age as of the end of 2018 _____
 Spouse age as of the end of 2018 _____
 Do you qualify for an additional standard deduction?
Taxpayer: _____
Spouse: _____ **Total** _____
 Check if you must itemize in 2018. (See Tax Help.)

Enter the Number of Dependent Exemptions You Will Claim on Your 2018 Tax Return
 Check if you will be the dependent of another person (but not if married filing jointly).
 Enter the number of **dependents** you will claim, do not include yourself or your spouse . . . _____
 Total exemptions _____

Enter Your 2018 Income and Deductions in 2nd column	2017 Actual	2018 Expected
Compensation:		
Annual wages and salary for taxpayer		
Medicare wages for taxpayer (W-2 box 5)		
Annual wages and salary for spouse		
Medicare wages for spouse (W-2 box 5)		
Annual net income from self-employment for taxpayer		
Annual net income from self-employment for spouse		
Other Tax Information:		
Note: Include this income in the Other Income section below.		
Net Investment Income for 3.8% tax		
Qualified dividends		
Maximum Capital Gains Rate Tax Information:		
Net short-term capital gains or losses		
Net long-term capital gains or losses		
Net 28%-rate capital gains included in long-term		
Unrecap'd Sec 1250 gains incl in long-term (see Tax Help)		
Investment income election (see Tax Help)		
Other Income:		
Total of your other taxable income and losses (see Tax Help)		
Foreign income or housing exclusions		
Adjustments:		
Deductible IRA contributions, alimony, etc		
Itemized Deductions:		
Total medical expenses		
State and local property and income taxes (or sales tax)		
Deductible foreign income taxes		
Deductible mortgage interest		
Cash charitable contributions		
Other charitable contributions		
Deductible investment interest expense, casualty or theft losses (see Tax Help)		
Miscellaneous itemized deductions subject to 2% of AGI		
Other misc itemized deductions not subject to 2% of AGI		
Net qualified disaster loss (see Tax Help)		
Other Deduction:		
Qualified business income deduction (see Tax Help)		

Income Tax Calculation for Your 2018 Tax Return	2017 Actual	2018 Expected
Taxable income		
Income tax		
Alternative minimum tax (Enter Alt Min tax expected in 2018)		
Premium tax credit repayment (Enter amt expected for 2018)		
Total credits (Enter credits expected in 2018)		
Tax on self-employment income and add'l 0.9% Medicare tax		
Net investment income tax (3.8%)		
Other taxes (Enter other taxes expected in 2018)		
Total federal income tax		

Enter the Tax Payments You've Already Made for Your 2018 Tax Return	
The federal income tax actually withheld from your paychecks to date	
Taxpayer	
Spouse	
Federal estimated tax payments you've already made	
Payment number 1 (April 17, 2018)	
Payment number 2 (June 15, 2018)	
Payment number 3 (September 17, 2018)	
2017 federal overpayment credited to 2018 (from page 1 above)	
Total taxes paid to date	
Balance of payments needed or (expected refund)	

Summary of Taxes to be Paid for 2018	
Federal income taxes to be withheld from your paychecks	
Your 2017 federal overpayment you applied to 2018	
Your 2018 federal estimated taxes, based on	
Estimate of total payments you will need to make for 2018	