

Estimated Taxes and Form W-4 Worksheet

Name: _____
SSN: _____

Choose the Method You Will Use to Pay Your 2019 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 2019 withholding will be _____

Overpayment from my 2018 return. _____

Amount of my 2018 overpayment to apply to 2019 instead of refunding it _____

Enter Your Filing Status and Other Information for Your 2019 Tax Return

Choose your filing status _____

Taxpayer age as of the end of 2019 _____

Spouse age as of the end of 2019 _____

Do you qualify for an additional standard deduction?

Taxpayer: _____

Spouse: _____ **Total** _____

Check if you must itemize in 2019. (See Tax Help.)

Dependent of Another

Check if you will be the dependent of another person (but not if married filing jointly).

Enter Your 2019 Income and Deductions in 2nd column	2018 Actual	2019 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)	_____	_____
Other itemized deductions	_____	_____
Net qualified disaster loss (see Tax Help)	_____	_____
Other Deduction:		
Qualified business income deduction (see Tax Help)	_____	_____

Income Tax Calculation for Your 2019 Tax Return	2018 Actual	2019 Expected
Taxable income		
Income tax		
Alternative minimum tax (Enter Alt Min tax expected in 2019) . . .		
Premium tax credit repayment (Enter amt expected for 2019) . . .		
Total credits (Enter credits expected in 2019)		
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 2019)		
Total federal income tax		

Enter the Tax Payments You've Already Made for Your 2019 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 15, 2019)	
Payment number 2 (June 17, 2019)	
Payment number 3 (September 16, 2019)	
2018 federal overpayment credited to 2019 (from page 1 above)	
Total taxes paid to date	
Balance of payments needed or (expected refund)	

Summary of Taxes to be Paid for 2019	
Federal income taxes to be withheld from your paychecks	
Your 2018 federal overpayment you applied to 2019	
Your 2019 federal estimated taxes, based on	
Estimate of total payments you will need to make for 2019	