

2024 Tax Projection Worksheet

If you think you will have significant changes for the upcoming year, please let me know on this worksheet, with as specific details as you can give me. I will use this information to give you any necessary adjustments to your withholdings for 2024 in conjunction with the current tax laws.

Income:

Large raise / Change of jobs and salary? _____

Sale of stock / bonds with large gains or losses? _____

Starting a business / projected income? _____

Other? _____

Expenses:

New house / refinancing mortgage? _____

Expect to make large charity contribution? _____

Other expenses / cash outlays? _____