



QUARTERLY ESTIMATE WORKSHEET

Taxpayer Name _____ Contact # _____

Spouse Name _____ Filing Status _____

Quarter # _____

TAXPAYER

SPOUSE

Freelance/self-employed income / 1099 income _____
TOTAL YEAR TO DATE

TOTAL YEAR TO DATE

Total estimated expenses _____
TOTAL YEAR TO DATE

TOTAL YEAR TO DATE

Y-T-D estimated already paid to **IRS** _____

Y-T-D estimated already paid to **NY State** _____

If you also have W-2 income, please provide a copy of your last paystub* OR the following information:

*If you file a joint tax return, we need a copy of both of your last paystubs.

W-2 income _____

Federal withholding _____

State withholding _____

Local withholding _____

Investment/interest income _____

Y-T-D mortgage interest _____

Y-T-D real estate tax _____

Notes _____