



## 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 \_\_\_\_\_