



W4 - PAYROLL WITHHOLDING CHECK-UP

We can help prepare your employer's W4 to minimize your balance due and keep you from paying penalties. We can also provide solutions on how to keep more of your paycheck instead of allowing the Government to hold your money! Cost for this service is \$75.

Please gather the following information for your Tax Advising Team:

- Most Recent Tax Returns *if we have not prepared your returns*
- **Income:**
 - Most recent check stub for ALL employers
 - Most recent check stub from retirement/pensions
 - Most recent statement from all investment accounts *if you do not have your investments with our firm*
 - Most recent statement from banks and credit unions
 - Monthly Alimony received
 - Monthly Social Security benefits *before* withholdings and Medicare premiums
 - Monthly Medicare premiums and tax withholding from Social Security benefits
 - State Income Tax refund from previous year (if you are new to our firm)
- **Other Income - we can use the same numbers from last year if you are confident they will be the same:**
 - Projected K1 - Form 1065, 1120S, 1041
 - Projected rental income and rental expenses
 - Hobby income and expenses
 - Gambling winnings and losses
- **Deductions:**
 - Most recent mortgage and/or Home Equity Line of Credit on all properties
 - Projected Property tax bills on all properties owned
 - Projected charitable donations
 - Projected medical expenses out of pocket
 - Projected alimony paid
 - Projected Childcare Records