

120 Water Street, Suite #355; North Andover; 01845

**2020 Tax Projection Worksheet**

Taxpayer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Note: Please include a copy of a current pay stub as well as the final paystub for any job that ceased in 2020.**

Did your dependents change for **2020**? **Yes No**

**If YES, please explain**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are your interest and/or dividends significantly different for **2020**? **Yes No**

**If YES, attach details.**

Are your capital gains/losses (stock sales) significantly different for **2020**? **Yes No**

**If YES, attach details.**

Is your rental income significantly different for **2020**? **Yes No**

**If YES, attach details.**

Is any of your other income significantly different for **2020**? **Yes No**

**If YES, attach details.**

Are any of your other medical, charity or business expenses significantly different for **2020**? **Yes No**

**If YES, attach details.**

Is your mortgage or real estate tax significantly different for **2020**?  **Yes No**

**If YES, attach details.**

Have you made all scheduled federal and/or state estimated payments for **2020**? **Yes No**

**If YES, attach details.**

Did you collect unemployment for **2020**? **Yes No**

**If YES attach details.**

Were you self-employed during **2020? Yes No**

**If YES attach income earned and expenses.**

Did you receive a PPP (Payroll Protection Plan) loan during **2020? Yes No**

**If YES attach loan info and forgiveness info.**