

LMM & Associates, Inc. – Tax Projection Checklist

In order for us to prepare your Tax Projection, please provide the following information:

- Current Paystubs
- Real Estate Tax Bill
- Mortgage Interest statement
- Charitable Contributions
- Withholding Statements from Pensions, IRAs, etc
- Please inform us of the following:
 - Change in marital status
 - Number of dependents
 - Change in investment income
 - Alimony payments / income
 - Business Income

Notes:

Signed: _____ Email: _____

Please forward the above information, any other pertinent statements/documents, and this checklist to the office at 9 Crystal Lake Road, Suite #200, Lake in the Hills, IL 60156.

Thank You!

Laura M. Mraz, EA, RIA