- Taxes -

Financial Year: _____

Date to finalize tax document for filing: _____

This Year Taxes

- ☐ All items reviewed on the tax checklist
- ☐ Receipts Scanned(Photos Taken and saved)
- ☐ Tax Documents backed up
- ☐ Mileage log checked and completed
- ☐ _____
- ☐ _____
- ☐ _____

Filing This Year Taxes

- ☐ Information sent to accountant: _____
- ☐ Tax documents filed: _____
- ☐ Tax debt or refund notice received _____
- ☐ Tax debt (refund received) paid: _____ Payment method: _____
- ☐ Tax binder updated & finalized for _____ financial year
- ☐ Spouses tax binder updated & finalized for _____ financial year
- ☐ Final tax documents backed up
- ☐ _____
- ☐ _____
- ☐ _____

Quarterly Taxes Paid

	Budgeted	Actual Due	Day Paid	Payment Method	Difference	Payment Proof Filed
Q1						
Q2						
Q3						
Q4						

- Taxes -

Financial Year: _____

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- ☐ _____

Quarterly Taxes Paid

	Budgeted	Actual Due	Day Paid	Payment Method	Difference	Payment Proof Filed
Q1						
Q2						
Q3						
Q4						

- Tax Deduction -

- Tax Deduction -

- Tax Deduction -

- Tax Deduction -

- Tax Information -

Name _____

Financial Year _____

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- Tax Information -

Name _____

Financial Year _____

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- Tax Information -

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Financial Year _____

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- Tax Information -

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Financial Year _____

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- Estimated Taxes -

Name _____

Financial Year _____

Income	Sum	Note
Less Allowable Deductions	**Sum**	
Total Deductions		
Estimated Taxable Income		
Tax Rate		
Estimated Taxes Due		
Estimated Monthly Due		

- Estimated Taxes -

Name _____

Financial Year _____

Income	Sum	Note
Less Allowable Deductions	**Sum**	
Total Deductions		
Estimated Taxable Income		
Tax Rate		
Estimated Taxes Due		
Estimated Monthly Due		

- Estimated Taxes -

Name _____

Financial Year _____

Income	Sum	Note
Less Allowable Deductions	**Sum**	
Total Deductions		
Estimated Taxable Income		
Tax Rate		
Estimated Taxes Due		
Estimated Monthly Due		

- Estimated Taxes -

Name _____

Financial Year _____

Income	Sum	Note
Less Allowable Deductions	**Sum**	
Total Deductions		
Estimated Taxable Income		
Tax Rate		
Estimated Taxes Due		
Estimated Monthly Due		

Bills Tracker

Bills		Month											
Bill	Unit	1	2	3	4	5	6	7	8	9	10	11	12

Bills Tracker

Bills		Month											
Bill	Unit	1	2	3	4	5	6	7	8	9	10	11	12

Bills Tracker

Bills		Month											
Bill	Unit	1	2	3	4	5	6	7	8	9	10	11	12

SAVING TRACKER

SAVING FOR:

DATE	DEPOSIT	AMOUNT

SAVING FOR:

DATE	DEPOSIT	AMOUNT

SAVING TRACKER

SAVING FOR:

DATE	DEPOSIT	AMOUNT

SAVING FOR:

DATE	DEPOSIT	AMOUNT

SAVING TRACKER

SAVING FOR:

DATE	DEPOSIT	AMOUNT

SAVING FOR:

DATE	DEPOSIT	AMOUNT

DEBT TRACKER

ACCOUNT:

MINIMUM:

CREDIT LIMIT:

ACCOUNT ID:

DUE DATE:

INTEREST RATE:

PASSWORD:

BALANCE	PAYMENT	DATE	NEW BALANCE

DEBT TRACKER

ACCOUNT:

MINIMUM:

CREDIT LIMIT:

ACCOUNT ID:

DUE DATE:

INTEREST RATE:

PASSWORD:

BALANCE	PAYMENT	DATE	NEW BALANCE