

Name(s) _____ Date _____

Federal and State income taxes

This year's filing status _____

Are you paying estimated taxes? _____ If so, include in Regular Expenses

Location of this year's tax info _____

Previous years' tax returns/records

Year(s) _____ Location _____

Year(s) _____ Location _____

Property tax

Property 1 _____

County _____ Parcel # or other ID _____

Property 2 _____

County _____ Parcel # or other ID _____

Property 3 _____

County _____ Parcel # or other ID _____

Location of property tax records _____

Gift and Estate Taxes

Have you ever paid gift taxes? _____ Gift recipient(s) _____

Location of records _____

Do you expect to owe estate taxes? _____ (\$2 million exemption, 2006-08)