

2023**California Estimated Tax Worksheet for Next Year****CA_ETA****Important:** Do Not attach to return for Practitioner use ONLY.

Name(s) as shown on return

SSN or ITIN

(Line references match Federal 1040 for Section A & B)

Section A - Income

| | A CA 2023 Amounts | B CA Projected Amounts |
|--------------------------------------------------------------------------------------------|-----------------------------|----------------------------------|
| 1 Wages, salaries, tips, etc. | | |
| 2b Taxable interest income. | | |
| 3b Ordinary dividends. | | |
| 4b Taxable IRA distributions. | | |
| 5b Taxable pensions and annuities. | | |
| 6b Social security benefits | | |
| 7 Capital gain or (loss). | | |
| 1 Taxable refunds, credits, offsets of state and local income taxes | | |
| 2a Alimony received | | |
| 3 Business income or (loss). | | |
| 4 Other gains or (losses) | | |
| 5 Rental real estate, royalties, partnerships, S corporations, trusts, etc. | | |
| 6 Farm income or (loss) | | |
| 7 Unemployment compensation. | | |
| 8 Other income. | | |
| 9 Total. Combine line 1 through line 8 in column A and B. Go to Section B. | | |

Section B - Adjustments to Income

| | | |
|---------------------------------------------------------------------------------------------------------------------|--|--|
| 11 Educator expenses | | |
| 12 Certain business expenses of reservists, performing artists, and fee-basis government officials | | |
| 13 Health savings account deduction | | |
| 14 Moving expenses. | | |
| 15 One-half of self-employment tax | | |
| 16 Self-employed SEP, SIMPLE, and qualified plans | | |
| 17 Self-employed health insurance deduction | | |
| 18 Penalty on early withdrawal of savings. | | |
| 19a Alimony paid | | |
| 20 IRA deduction | | |
| 21 Student loan interest deduction | | |
| 22 Reserved | | |
| 23 Archer MSA deduction | | |
| 24 Other adjustments | | |
| 26 Add lines 11 through 24 in columns A and B. | | |
| 27 Total. Subtract line 26 from line 9 in columns A and B. Adjusted Gross Income (AGI) | | |

Section C - California Projected Tax Computation

| | | |
|----------------------------------------------------------------------------------------------------------------------------------------|----------|--|
| A Projected CA standard deduction OR CA itemized deductions (CA 540 line 18) | A | |
| B Subtract line A (Standard/itemized deduction) from line 23 (AGI) (Projected Taxable Income) (CA 540 line 19) | B | |
| C Projected Tax (CA 540 line 31) | C | |
| D Projected Exemption Credits (Personal, Blind, & Senior = \$144 - Dependents = \$446) (CA 540 line 32) | D | |
| E Subtract line D (Exemption Credits) from line C (Projected Tax) (CA 540 line 33). | E | |
| F Projected Additional Tax (CA Schedule G-1 or CA 5870A) (CA 540 line 34) | F | |
| G Add line E (Tax Sub-total) and line F (Additional Tax) (CA 540 line 35). | G | |
| H Projected Credits (CA 540 line 47). | H | |
| I Subtract line H (Projected Credits) from line G (Tax Sub-total) (CA 540 line 48) | I | |
| J Projected Other Taxes (CA 540 line 61, 62, 63, 64, 91) | J | |
| K Add line I (Tax Sub-total) and line J (Other Tax) | K | |
| L Projected Payments (CA 540 line 78) | L | |
| M Subtract line L (Projected Payments) from line K (Tax Sub-total). Projected Net Tax. | M | |

Projection Explanations: