

How do I enter withholding amounts?

To enter withholding amounts

1. In the **Withholdings** (or **Withholdings to Date**) field, enter or verify the amount of accumulated federal tax withheld to date.
 - **Tell me more**
If you have the Tax Planner calculate your data based on recorded Quicken transactions, scheduled transactions, or year-to-date data, the Tax Planner displays a total for the entire year.
2. In the **Next Pay Date** field, enter or verify the date you'll receive your next paycheck.
 - **What if Quicken already displays a value?**
If you've chosen Quicken Data as your data source, then this is filled in for you.
3. In the **Pay Period** list, select the appropriate pay period: Every two weeks, Twice/month, Monthly, or Weekly.
 - **What if Quicken already displays a value?**
If you have the Tax Planner calculate your data based on a [scheduled paycheck transaction](#), the pay period is filled in for you.
4. In the **Withholding Per Pay Period** field, enter or verify the amount of federal tax currently being withheld from your wages each pay period.
 - **Tell me more**
If you have the Tax Planner calculate your data based on a scheduled paycheck transaction, this reads **Sched: Included**. If you have the Tax Planner estimate amounts based on your year-to-date daily average, this reads **Proj: Included**.
5. In the **Projected Future Withholding** field, verify the amount of projected total withholding per pay period multiplied by the remaining pay periods this year.
 - **Tell me more**
Quicken calculates this field automatically based on the current amount being withheld each pay period and the number of future paychecks you will receive.
6. In the **Other Withholding** field, enter the amount of federal tax currently being withheld from miscellaneous earnings such as unemployment, gambling winnings, and so on.
7. In the **Total Withholdings To Date, Projected Future Withholding, Plus Other Withholding (includes Self and Spouse)** field, verify the total carried over to the **Less: Withholding** field. (This field is calculated automatically.)
8. In the **Tax Payment Summary** area, verify the remaining tax due or refund based on your present withholding and any estimated tax payments.
 - **Tell me more**
The Tax Planner automatically calculates this section.
 - **Projected Tax:** The Tax Planner calculates this amount based on the data source in the tax profile.
 - **Less: Withholding:** The Tax Planner copies this amount from the Total Withholdings To Date, Projected Future Withholding, Plus Other Withholding (includes Self & Spouse) line above.
 - **Less: Estimated Tax Payments:** The Tax Planner copies this amount from the Total Estimated Tax Payments and Refunds Applied line on the [Estimated Tax Payments](#) page.

Notes

Remember that the purpose of the **Tax Planner** is to help you get a realistic view of your tax liability for the year. The **Planning** tab also includes a tool that is specifically designed to help you experiment with your withholding amounts—the [Tax Withholding Estimator](#). Use the Tax Withholding Estimator to see if you should be withholding more or less from your paycheck. To get to the **Tax Withholding Estimator**, click the **Planning** tab. Click the **Tax Center** button. Choose **Tax Tools** and then **Tax Withholding Estimator**.



Note for our Canadian Customers

The following terms will be different in the Canadian releases of Quicken.

Canada: "Cheque" / United States: "Check"
Canada: "Colour" / United States: "Color"
Canada: "Centre" / United States: "Center"
Canada: "Realise" / United States: "Realize"
Canada: "Behaviour" / United States: "Behavior"
Canada: "Analyse" / United States: "Analyze"