

Get Organized Checklist: Taxes

Record Keeping System

- Designate space for tax records and files
- Print off income tracking sheet
- Create an income file, folder or envelope
- Create files for each major expense category
- Create 3 folders or files for investments

Income File

- Income tracking sheet
- Pay stubs
- Invoices
- Receipts

Investment Categories

- Deductible/Tax-Deferred
- Taxable

Investment Documentation

- Proof of contributions
- Distribution records
- Statements
- Confirmation slips

Expenses Categories

- Home ownership
- Charitable donations
- Medical & Health Insurance
- Childcare
- Educational
- Job-Related
- State, Local & Sales Tax
- Miscellaneous

Expenses Documentation

- Monthly & quarterly statements
- Bills
- Receipts
- Canceled checks