

# HOW TO LEVEL UP

## YOUR TAX PREPAREDNESS



Collecting W-2 forms and expense receipts is a given, but your tax return battle may benefit from a little preparation beyond the obvious.

### BEFORE SITTING DOWN

- ☐ Choose IRS-approved tax preparation software suitable for your tax situation.
- ☐ Have non-tax personal information handy, such as a spouse's social security number.
- ☐ Review last year's return for deductions and credits you can carry forward.
- ☐ Collect information on previously paid taxes such as real estate and state income taxes.

### READY YOUR "TAX OFFICE"

- ☐ Set out a calculator, scratch pads, pens and pencils for checking calculations.
- ☐ Fully charge your laptop battery or plug in the power cord to avoid interruptions.
- ☐ Clear lots of table space for spreading out forms, receipts and tax schedules.
- ☐ Pick up paper and ink for hard copies of your forms.

### COMPLETE YOUR RETURN

- ☐ Have coffee, drinks and snacks at the ready for your comfort and energy.
- ☐ Break the work into manageable sections.
- ☐ Save time to double-check your data entry on all forms and receipts.
- ☐ Make notes for next year's return and file supporting documents together.