MONEY

Set up one secure system

Make records findable without deciding what they mean.

TAX DOCUMENT ORGANIZER

CHOOSE A DOCUMENT HOME

Create labeled physical folders, encrypted digital folders, or both. Use categories and dates consistently; this workbook helps organize documents, not determine filing treatment.

- ☐ Current year, prior years, notices, and questions
- ☐ Restrict access to people who truly need it
- ☐ Back up digital records securely

EXAMPLE

Example: ·2026 / Income / Employer A· holds a received statement and its download confirmation.

PUT IT INTO PRACTICE

Where will this year·s records live?

Who needs access to this system?

Organizational information only, not tax, financial, or legal advice. Tax rules, forms, and deadlines vary; use official tax-agency information or a qualified tax professional for guidance.

MONEY

Collect income records

Gather statements as they arrive; do not rely on memory.

TAX DOCUMENT ORGANIZER

TRACK EXPECTED DOCUMENTS

List employers, platforms, banks, investment providers, and other sources that may issue records. Note whether each item has arrived, where it is saved, and any question for the issuer or preparer.

- ☐ Source name and expected document
- ☐ Received date and storage location
- ☐ Missing-item follow-up date

EXAMPLE

Example: Employer A statement received January 31; savings account statement expected in February; both are logged without interpreting amounts.

PUT IT INTO PRACTICE

Which expected record has not arrived?

What source should I verify with directly?

MONEY

Sort expense and payment records

Keep source documents with clear labels and context.

TAX DOCUMENT ORGANIZER

PRESERVE SUPPORTING RECORDS

File receipts, invoices, payment confirmations, and statements by date and purpose as they occur. Add a short factual note when a record would be hard to recognize later.

- [ ] Keep original source and a readable scan if needed
- [ ] Label business, household, or mixed-context records clearly
- [ ] Do not alter documents or invent missing details

EXAMPLE

Example: A receipt is saved as ·2026-04-12 equipment receipt · work project note,· alongside its payment confirmation.

PUT IT INTO PRACTICE

Which record needs a factual note today?

Is the original document readable and secure?

MONEY

Organize life changes

Changes can create documents and questions worth flagging.

TAX DOCUMENT ORGANIZER

MAKE A CHANGE LOG

Record major events such as a move, job change, education, caregiving, marriage, separation, property transaction, or dependent change. Attach relevant notices and ask an official source or qualified professional about consequences.

- ☐ Event date and related documents
- ☐ Names of organizations to contact
- ☐ Questions to verify, not assumptions

EXAMPLE

Example: ·Moved June 3; saved lease closeout and new address confirmation; ask preparer which records are needed.·

PUT IT INTO PRACTICE

What changed this year that created paperwork?

What question should be answered by an official source?

MONEY

Read notices carefully

A notice is a document to preserve and address promptly.

TAX DOCUMENT ORGANIZER

CREATE A NOTICE LOG

Keep the complete notice, envelope or delivery date, reference number, stated deadline, and any response record. Verify contact details independently before sharing information or making a payment.

- [ ] Do not ignore a deadline
- [ ] Use the agency·s official website or known number
- [ ] Keep copies of every response and confirmation

EXAMPLE

Example: A notice dated March 8 has a response date of April 7; it is scanned, logged, and reviewed through the official agency portal.

PUT IT INTO PRACTICE

What deadline is printed on the notice?

How will I verify the contact route independently?

MONEY

Prepare a question packet

Specific questions make professional or official help more efficient.

TAX DOCUMENT ORGANIZER

SEPARATE FACTS FROM QUESTIONS

Write a short timeline and attach only relevant records. State what you know, what document supports it, and what you need clarified; do not ask someone to guess from incomplete information.

- ☐ Question, event date, and attached record
- ☐ Name of official source or professional to ask
- ☐ Space to record the answer and date

EXAMPLE

Example: ·I received two statements from the same provider. Are both expected?
Attached: both statements and account message.·

PUT IT INTO PRACTICE

What is my most important unresolved question?

Which document supports the facts in it?

MONEY

Review and retain securely

Close the season with an orderly archive and reminders.

TAX DOCUMENT ORGANIZER

COMPLETE THE RECORD

Confirm where final copies, confirmations, and correspondence are stored. Follow applicable official guidance and professional advice about retention; protect identifiers by limiting sharing and disposing of unneeded copies securely.

- [ ] Save final filed copy and confirmation separately
- [ ] Record future dates or follow-up tasks
- [ ] Review folder permissions and paper storage

EXAMPLE

Example: After filing, Devon stores the confirmation with the final copy, removes a duplicate download from a shared folder, and notes a follow-up date.

PUT IT INTO PRACTICE

Can I locate the final record quickly?

What follow-up date belongs on my calendar?