



## What Can I Do Now to Make Next Year's Tax Season Easier?

Every spring, many people promise themselves that next year they'll be better prepared for taxes. Yet once April passes, paperwork often gets pushed aside until the cycle repeats. A few simple steps taken now can make next year's tax season far less stressful. Starting new habits while the experience is still fresh can help prevent rushed decisions, missing documents, and unnecessary frustration when the next filing deadline approaches.

### What's the most helpful first step?

Create one consistent filing system for tax-related documents. This can

be paper folders, digital folders, or a combination of both. The format matters less than having a clearly defined place to save documents throughout the year. What types of documents should be collected as the year goes on?

### Commonly overlooked items include:

- Charitable donation receipts
- Medical and dental expenses
- Education-related costs
- Business or work-related expenses
- Mortgage interest and property tax statements

Saving these as they occur avoids a time-consuming search later.

### Should people rely on paper statements from banks and institutions?

Not entirely. Many financial institutions release tax documents online weeks before paper copies arrive. Downloading and saving these statements as soon as they become available ensures nothing is missed and provides a backup if mail is delayed or misplaced.

### How do life changes affect tax preparation?

Major events such as a job change, retirement, marriage, divorce, inheritance, or the purchase or sale of a home can all affect taxes. Keeping brief notes and storing related documents in a designated paper or electronic folder helps ensure important details aren't forgotten.

### How often should records be reviewed?

Reviewing documents once or twice a year, rather than waiting until March, allows missing information to be identified early.

Staying organized doesn't require perfection. Small, consistent steps taken now can make next year's tax season far calmer and more manageable.

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