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How to best use your Tax Organizer

Many tax organizers come back to the tax preparer in the same envelope the preparer sent it to the client in and still sealed! Why, most people don't want to fill them out because it takes too long and taxes give them a headache! So here are a couple of ways to use the tax organizer without filing it out.

- 1) Scan through the tax organizer to refresh your memory of tax deductions and documents gathered earlier in the year and forgotten about.
- 2) Go through the organizer and put a check mark next to any item that applies to you
- 3) If you had your taxes done with us last year, go through the organizer and put a check mark next to any item that has changed during the year.
- 4) Don't fill out the entire organizer, you've hired us to do the heavy lifting.