

# GETTING READY FOR THE TAX MAN

## Tips to Help Organize Documents, Minimize Tax-Time Stress™

(NAPSA)—The tax man is coming—do you know where your W-2s, investment plan statements and receipts for deductible expenses are? Now is the time to track down and organize your tax-related documents, to make sure they are easy to reach when you are ready to file.

To help you navigate paper piles and reduce the hassle and stress that often is part of the tax-filing process, here are some organizational tips from ACCO Brands, a global office products company that has provided people with organizational solutions for 100 years through its family of brands, including Wilson Jones storage, filing and organization products; Swingline staples and punches; Perma records storage products; and Day-Timer planners:

- **Identify and isolate what you need for now.** Break out the documents you'll need to complete your tax form: W-2s, year-end investment statements, year-end checking account statements, receipts from charitable donations, and medical and work-related receipts. If you saved sales receipts and use a paper-based planner, store them temporarily in customized folders, such as Day-Timers' ColorLife Slash Pockets.

- **Pick a storage system that works best for you.** Once you've gathered the documents, find a storage system that makes it easy to distinguish and pull what you want when you need it. Manila folders packed in a table-top file box and lightweight three-ring binders, such as an Active Use Binder with tabs that you can find and customize for free at wilsonjones.com, are two options. If you take documents out of the home to work with tax preparers, consider a covered accordion-style file with a handle that is designed to keep documents organized, secure and easy to tote.

- **Implement a tabbing system that makes documents easy to sort.** Whether you organize by color or numbers, incorporate a tabbing system that makes it simple to remember what you have filed. It will help prevent last-minute digging for missing documents, which will help minimize stress when you're working to meet filing deadlines.

- **Create categories to organize your files.** Do you have detailed work-related deductions? Do you contribute to a wide range of charities? Did you make a major purchase in the last year that entailed extensive paperwork, such as a house or other

property purchase? If so, create enough subsets for your files to match those requirements.

- **Keep last year's tax filing and back-up documents handy in a portable folder.** As you prepare this year's taxes, questions may arise about last year's filing. Make sure to have your most recent past return and backup documentation with you when you are preparing this year's taxes.

- **Anticipate what will go into your long-term files.** For past year's returns and other related documents you decide to keep, consider grouping documents in binders or in an archive file box, like those made by Perma.

- **Pack a small sack of supplies.** Along with the tax documents, be sure to bring some key work tools along—pens, pencils, calculator, ACCO paper clips, and a pocket-sized stapler, such as Swingline's TOT Grip model. Having supplies handy will allow you to mark, clip and staple your materials as needed on the spot, organizing and filing them without delay to avoid confusion later.

For more information about organizational tools designed to keep you on top of your documents during the tax season and year-round, visit [accobrands.com](http://accobrands.com).