



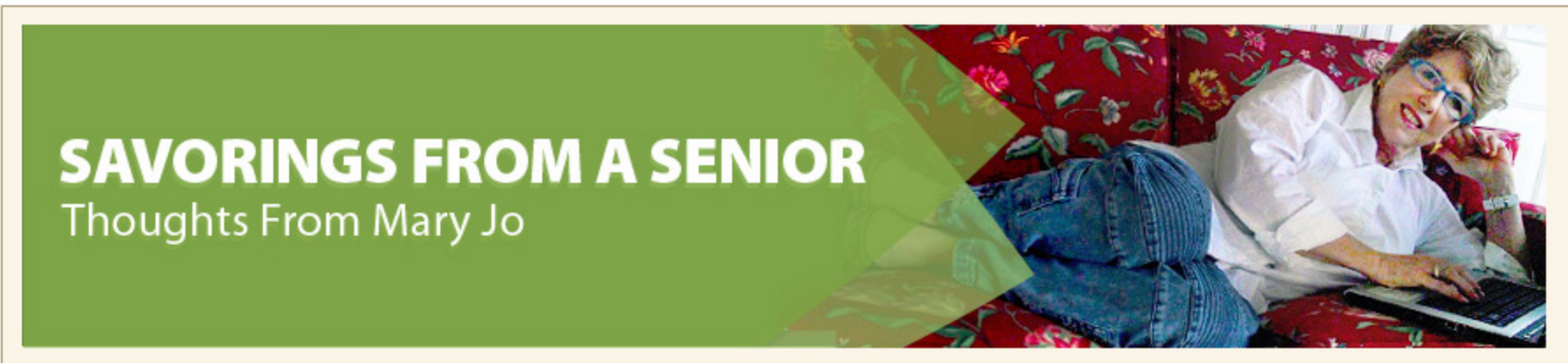
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Tax Preparation Made Easy!

Author: Tracy Colleran, professional organizer

We have all kinds of reasons for holding onto all our personal and professional papers. It could be that we rely on our accountant to handle our bookkeeping. Perhaps we've just moved into a new home and didn't want to bother sorting. Or maybe we are just simply unsure of what to keep and what to toss, for fear of repercussions from the IRS.



Tax time is never fun for anyone...and it can be even worse for self-proclaimed procrastinators and pack rats. But there *is* light at the end of the tunnel! Here are a couple tips to make your tax preparation a little more bearable.

Medical receipts: If you itemize your medical expenses, you may be trying to keep track of all those pesky prescription drug receipts. An easier way to deal with prescription receipts is to go to your pharmacy and ask for a printout of all of your prescriptions for the entire year. They can do one of each member of your family and the entire year will be calculated for you.

Investment accounts: Most people aren't real motivated to review in detail each of their investment account statements. When it comes to paperwork for IRAs and mutual funds, we may have a tendency to keep everything...or nothing. The paper volume may be further increased with multiple accounts within the same fund. A helpful solution is to keep a typed master list of all accounts, complete with full account numbers. Keep a copy with the statements in a binder (or multiple binders) and update as needed. Archive the binders and repeat at year-end. Consider talking to your financial advisor or fund manager about going paperless.

Self-purging folders: Most accountants agree that you need to save documentation and receipts for seven years in case of an audit (refer to www.irs.gov for further guidance). Buy seven identical poly-expanding wallets (accordion files). Expanding box bottom hanging file folders will also work. Using a label maker, label each one for seven years. On the eighth year, pull the label off the first file and shred its contents. Replace with a new label and paperwork for the current year. Continue the process year after year.

About Tracy Colleran:

Professional organizer Tracy Colleran provides quality and efficient organizing services for homes and home offices in the Naples area. Tracy graduated from Florida Gulf Coast University with a bachelor's degree in Marketing and Advertising. Her real passion in life, however, is organizing. This was made manifest during her years of employment in home offices and small companies.



These organizing methods from the professional world carried over into her personal life. Tracy always got excited to help her family and friends straighten up their closets, garages, kitchens, and photo albums and memorabilia. Most people think she's crazy for finding joy in the very things that less organized people find overwhelming! This is how Straighten Up, Inc. was born and Tracy turned her obsession into a profession.

Website: <http://www.straightenupinc.com/>

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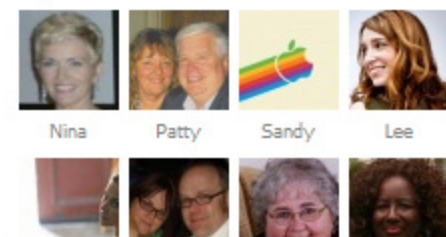
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