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Tax Season Tips: The power of good record keeping

We are approaching the end of the current tax season. Many have filed and already received their refunds. Others are putting off filing until the very last minute for various reasons. Some wait to file because they know they will owe the IRS, while others simply procrastinate because they dread sorting through their files to find all the information they need for their return. While filing taxes isn't something to look forward to for most, the process becomes dramatically easier – and far less stressful – when good records are maintained throughout the year. Here are three reasons why keeping organized records is one of the smartest moves you can make.

1. Accurate records protect your refund. Every deduction, credit, and adjustment you qualify for depends on proof. Organized records ensure you don't overlook legitimate tax benefits simply because you can't find the paperwork. Whether it's business expenses, charitable donations, medical costs, or education credits, documentation is the key to claiming what you're entitled to.
2. Strong documentation protects you in an audit. No one expects the dreaded audit, but they do happen. When they do, the IRS isn't interested in your memory; they want evidence. Having receipts, logs, invoices, and statements neatly organized can turn a potentially stressful situation into a straightforward one. Good records don't eliminate the possibility of an audit, but they absolutely make one easier to navigate.
3. Missing documents are a big stressor when it comes to tax filing. When you keep your records organized throughout the year, you avoid the last-minute panic of digging through drawers, inboxes, or even glove compartments. Keeping a log of mileage related to your taxes is also important. Take advantage of digital apps that will assist you year-round. A little extra effort to stay organized each month can save time and frustration when tax season arrives.

As we wrap up this tax season, make it a goal to keep good records and stay organized for 2026. Record keeping isn't always fun, but it's one of the most effective ways to take control of your financial life. It protects your refund and makes tax filing manageable. Think of it as a year-round investment in your own peace of mind. The next time you file your taxes, you'll be glad you've made the effort.

Speaking of taxes, if you enjoy working with people and don't mind filing your own taxes, there are volunteer opportunities available to help others here in our community. We are currently seeking volunteers to work with the AARP Tax-Aide service in Crawford, Labette, Montgomery, and Wilson counties in Kansas next year.

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