MONEY
HUSTLE MINDSET

Personal Tax Prep Organizer

Tax Season Starter Pack

Get your money story and documents in one place before tax season hits.

For individuals & families · Education only, not tax advice.

Read Me First
(How to Use This Organizer)

This is not a textbook. It is an action plan. The goal is to find money you are already wasting and move it to a place where it grows.

This organizer is here to help you:

- Gather the most important documents and details in one place
- See, in plain language, what actually happened with your money this year
- Walk into your tax software or tax professional's office feeling more prepared, not ashamed or confused

How to use it:

1. Go through the checklists and mark what you already have.
2. Fill in the summary pages with the numbers you know.
3. Bring this organizer when you file or meet with your tax pro, and use it as your "cheat sheet."

This is for your own clarity and organization. It does not tell you what to claim, what's deductible, or how you should file.

Year Snapshot & Life Changes

Tax year:

Who is this for?

Name(s):

Dependents (names or initials):

What changed this year?

(Check anything that applies and add notes.)

- ☐ New job or job change
- ☐ Moved
- ☐ Marriage or separation/divorce
- ☐ New child / adoption
- ☐ Started or stopped a side hustle
- ☐ Big medical events
- ☐ Other major change:

Notes to myself:

"If I had to explain this year in 3–4 sentences, here's what I'd say about my money and life changes..."

Income Overview

Use this page to list your main income sources and any documents you've received about them. You don't have to know what each thing means — this is just to keep everything in one place.

Income types & notes

W-2 job(s):

Documents:

Side income / gig work:

Documents:

Unemployment or other government benefits:

Interest / dividends (banks, investments):

Retirement income (pensions, 401(k) withdrawals, etc.):

Other income (explain):

Reminders:

- *Look through your email and physical mail for any "tax document" alerts.*
- *Log into your main bank and work portals to see if any forms are ready.*

Life Events & Documents Checklist

These life events may come with documents you want ready at tax time. This list is to help you remember them, not to tell you what must go on your tax return.

This organizer is here to help you:

Events	Action Taken (Cancelled / Sold / Transferred)	Notes
“Child care / daycare payments”		
“College tuition or school expenses”		
“Student loan payments”		
“Bought or sold a home”		
“Property taxes”		
“Big medical bills”		

Key Bills & Big Expenses Summary

Use this page to see the big money themes from this year. This isn't a list of guaranteed deductions — it's a snapshot to help you and your tax pro talk clearly about your situation.

Category	Approx. total for the year	Notes / questions
Housing (mortgage + property tax)		
Child care		
Medical / health		
Debt payments (loans, credit cards)		
Education		
Other major expense		

Questions & Notes
For Tax Time

Take this page with you when you sit down to file or meet with someone. You don't have to ask everything — this is just a place to park the worries in your head.

"I'm most worried about…"

"My biggest change this year was…"

"I'm unsure what to do with these forms or payments…"

"Is there anything I should be tracking differently for next year?"

Next Year,
Let’s Make This Feel Easier

After this year’s taxes are done, jot down what would have made this easier.

“Things that were hard or confusing this year.”

“Things I want to do differently next year (monthly habits, saving for taxes, etc.):”

“Reminders to my future self for next tax season:”