



TAX TIME WORKSHEET

Make the most of your tax refund

Your tax refund can help you pay for things you need right now. It can also help you save for things you want down the road.

1 What is important to you?

Putting even a part of your tax return into savings will help you get ahead and accomplish what's important to you.

I would like to save for:

Sudden expenses: Car repairs or medical bills

Big financial moves: Education, retirement, or a down payment on a house

Future purchases: New furniture or a vacation

Other _____

2 What percentage of your tax refund would you like to save?

10%

25%

50%

Other _____

3 How to manage your refund money

Taking care of your tax refund money can mean keeping it safe for spending, today and in the future. You've got great choices, and your tax preparer can help.

I would like to directly deposit my refund into my checking account, savings account, prepaid card, or other account.

I'm interested in buying a savings bond.

I know I want to save part of my refund, but I want to talk through my options first.

Not sure? Ask your tax preparer about your saving options.

Your total savings

Your tax preparer will help you calculate this section.

$$\text{YOUR TOTAL TAX REFUND} \times \text{YOUR PERCENT SAVED} = \text{YOU SAVED}$$



Consumer Financial
Protection Bureau

Talk to your tax preparer about all the ways you can save today.