

# warming up

for Tax Preparation for Filing with the IRS

Record ideas + plans in the boxes



## Set the Target

Due Date

When you plan to file, or turn them over to tax preparer

Method of Filing



## Estimate Total Prep Time

How many hours do you want to plan for?

For most people, prepping takes 3 - 10 hours, depending on things like: bookkeeping, how many expenses you have, volume of business, your comfort + experience with filing



## Work Style + Scheduling

Circle your preferences

How often do you want to work on this?

a little each week

1 - 2 half days

1 long day

What is the best time of day?

morning

afternoon

evening

weekend

Look over your calendar.

Check when completed →

Schedule in your desired work times. Check when completed →



## Help

If you need help, where can you get it?

Ideas: friends or family, colleagues, free help at the library, accountant, bookkeeper, good books



## Making it Fun

How do you want to make work sessions on this more fun?

Playlist or favorite CDs

TV show or movie to play in the background

Comfy clothes

Candles

Chocolate, fancy cheese, prosecco, cocktail



## Rewards

How do you want to reward yourself for each work session?

Record each reward in your calendar. Check when completed →

What Big Reward would you like when you're all finished?