

IRS

Recommendations

Taxpayers should develop a system to keep all their important information together. They can use a software program for electronic recordkeeping.



Throughout the year, taxpayers should add tax records to their files as they receive them. Having records readily at hand makes preparing a tax return easier.



In general, taxpayers should keep their documents for 3 years from the date they file the return.



Taxpayers should prepare for natural disasters such as floods, wildfires, & hurricanes by keeping tax documents in a safe place. Tax docs/returns, bank statements, & even insurance policies should be stored digitally & not only on paper.



TAXCADDY

Features

TaxCaddy IS an electronic recordkeeping system.

Bonus: it's extremely secure AND it's free for Avizo clients to use!

Download the app. Each time a new document comes in, open the app & take a picture of it. TaxCaddy saves it as a PDF. You can shred the paper instead of storing it in a drawer somewhere.

Your files AND your tax returns are easily accessible and securely saved for as long as you want.

Keep any and all important documents in TaxCaddy. You can securely access them anywhere and at any time.