



## Filing Taxes Stress-Free: It's All About Organization

February 19, 2013

### Planning and productivity experts at ACCO Brands provide tips on the Three P's of tax organization: Planning, Paper and Process

KETTERING, Ohio, Feb. 19, 2013 /PRNewswire/ -- Filing Federal and State taxes is a major task weighing in on many Americans' to-do lists this time of year—and it's one that is typically procrastinated upon. ACCO Brands Corporation (NYSE:ACCO), a leader in branded office and consumer products and print finishing solutions, is helping alleviate the stress of this annual endeavor with several tax organizing tips.

(Logo: <http://photos.prnewswire.com/pmh/20130114/CG41611LOGO-b>)

"Disorganization can be very costly to all of us, eating into our valuable time and causing heightened stress levels. Disorganized tax documents are no exception," says Lissa Cupp, vice president, e-Commerce and Consumer Marketing, ACCO Brands. "By getting organized and planning ahead, not only can filing your taxes be virtually stress-free, but it also could result in significant time and money savings."

Compiled by the planning and organizing experts at AT-A-GLANCE<sup>®</sup>, Day-Timer<sup>®</sup> and Day Runner<sup>®</sup>, the key elements of getting your tax materials organized are defined as the Three P's: Planning, Paper and Process.

**Planning:** More commonly than not, the issue at hand with tax filing procrastination is lack of planning. Tax preparation shouldn't be looked at through a small window of time but rather with a panoramic view of the entire year. Set up a monthly filing system for documents that will be needed to complete your annual tax forms. You can approach this in several different ways. For example, you can organize by categories (e.g., income, investment and deduction records) using large envelopes, expanding files or organizers designed specifically for tax materials. Color-coding within these can further expand your level of organization.

There is no single method that works for everyone. However, some type of year-round file system is a must if you want to lower your risk of errors and keep your stress levels at bay as you try to meet the hard deadline of April 15. Whether your process includes weekly or monthly updating is up to you—just be sure to break it down into manageable pieces so you don't get overwhelmed and the process doesn't snowball out of control.

**Paper:** An underlying issue that contributes heavily to tax-time procrastination is the quantity of information involved. This is primarily in the form of paper documents, most of which are mailed right to your door. We suggest erring to the side of caution and keeping any records that could be needed for tax preparation. Unnecessary documents can be purged once you've filed. Note that owners of small businesses or those who are self-employed typically require more documentation for their tax returns versus individual filers.

Here are examples of tax documents individuals should maintain throughout the year. They include but are not restricted to:

- W2s
- 1099s
- Mortgage interest and property tax statements
- Bank interest statements
- Investment statements
- Medical and charitable donation receipts
- Account registers

Many planners and organizers have sections where monthly records can be maintained. Keep and file these sections as well.

**Process:** Parts of the process you should have in place are already documented here, including filing systems and materials needed. The key is sticking to the plan. Use your calendar, checklists and reminder tools like Post-it<sup>®</sup> notes to stay on track. Once tax time is here, schedule yourself appointments in ½-hour to 1-hour blocks to work on your return(s). Depending on the individual, these "appointments" may be small in number or could spread over several weeks. Plan accordingly to meet the deadline, and keep on pace by setting small milestones that you can check-off as you complete.

And if you happen to get stuck, don't fret—there is plenty of help at [www.irs.gov](http://www.irs.gov), and we always recommend going to a professional if you're unsure about anything on your return. Remember, tax filing fees are deductible.

"By eliminating and consolidating cluttered tax document files as well as setting a solid plan and process, you reduce the chances of making errors on your tax return," adds Cupp. "When you follow the Three P's, the result is a Fourth P: Productivity."

For additional information on organizing your taxes as well as productivity tips for every facet of your life, visit the [Day-Timer blog](#) and the [AT-A-GLANCE blog](#).

#### About ACCO Brands

ACCO Brands Corporation is one of the world's largest suppliers of branded office and consumer products and print finishing solutions. The company's widely recognized brands include AT-A-GLANCE<sup>®</sup>, Day-Timer<sup>®</sup>, Five Star<sup>®</sup>, GBC<sup>®</sup>, Hilroy<sup>®</sup>, Kensington<sup>®</sup>, Marbig, Mead<sup>®</sup>, NOBO, Quartet<sup>®</sup>, Rexel, Swingline<sup>®</sup>, Tilibra<sup>®</sup>, Wilson Jones<sup>®</sup> and many others. More information about ACCO Brands can be found at <http://www.accobrands.com>.

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