YEAR-ROUND TAX PLANNING CHECKLIST

A MONTH-BY-MONTH TAX AWARENESS GUIDE

Staying proactive throughout the year helps reduce surprises and identifies opportunities to improve your financial picture. Use this checklist to stay organized and intentional.

JANUARY – MARCH

- ✓ Update personal info (address, dependents, marital status)
- ✓ Collect tax documents as they arrive
- ✓ Confirm withholding is correct (especially after bonuses)
- ✓ Track charitable receipts
- ✓ Upload all documents to your Infinity portal

APRIL – JUNE

- ✓ Set or adjust quarterly estimated payments
- ✓ Review retirement contributions year-to-date
- ✓ Track business or rental income
- ✓ Store receipts for major medical expenses
- ✓ Mid-year financial review with your Infinity advisor

JULY – SEPTEMBER

- ✓ Update mileage logs and business records
- ✓ Ensure bookkeeping is current
- ✓ Plan for education expenses or 529 contributions
- ✓ Consider Roth conversions (if appropriate)

OCTOBER – DECEMBER

- ✓ Finalize charitable contributions
- ✓ Harvest tax losses or gains
- ✓ Max out employer retirement plans
- ✓ Evaluate bonus or commission tax impact
- ✓ Prepare documents for year-end meetings
- ✓ Review beneficiary designations