



## Your Tax Season Check-In Checklist

### A simple financial reset for the year ahead

Use this checklist to bring clarity to your finances, spot opportunities to improve, and start the year with greater confidence.

#### 1. Get a clear view of your accounts

- Review recent transactions from the past 2–3 months
- Look for recurring payments, subscriptions, or seasonal expenses
- Note any unexpected charges or changes in spending
- Confirm your contact information is up to date

#### 2. Check your cash flow

- Compare monthly income to average expenses
- Identify months where spending tends to increase
- Look for small adjustments that could free up cash
- Consider where you may want more flexibility this year

#### 3. Revisit your budget

- Review your current budget categories
- Adjust for any changes in income or expenses
- Plan for upcoming costs (travel, tuition, home projects, etc.)
- Make sure your budget reflects today's priorities

#### 4. Check in on your savings goals

- Review your current savings balances
- Identify short-term and long-term goals
- Decide if you'd like to increase or adjust contributions
- Celebrate any progress you've made

#### 5. Set up account alerts to stay informed and avoid surprises

- Low balance alerts
- Large transaction alerts
- Payment reminders
- Deposit notifications

#### 6. Use digital tools to stay organized

- Log in to online or mobile banking
- Review transaction history and statements
- Download or save records for easy reference
- Explore tools that help you track activity and balances

#### 7. Ask questions and plan ahead

- Write down any financial questions you have
- Consider whether your current accounts still fit your needs
- Schedule time to speak with a banker if needed
- Get guidance to support your next financial steps

#### Your financial reset starts here

Tax season is more than a deadline, it's an opportunity to build clarity, set direction, and move forward with confidence. With the right information, tools, and support from Webster Bank, you're ready for what's next.