



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.