



Instructions for Creating Your Own Custom Organizer System

1. Decide which forms to print based on what you want or need to track in your current role.

TopTip: print several copies of each form you have chosen – just in case. If you decide on the “Load Data” form then print as many as you may need to cover your loads for as long as you are out – more is always better than less.

2. Decide on a 3-ring binder/planner that will best serve your needs.

TopTip: each form is formatted to print on standard 8.5 x 11 copier paper, and to work with the zippered (w/handles) binder/planner from Walmart – for privacy.

3. Based on the number of different forms you plan to use; purchase a “set” of section dividers with clear or colored tabs – your choice.

TopTip: purchase a set of section dividers with more dividers than you will currently need – just in case you expand in the future.

4. Fill in the tab cards with the name of each section/form and insert into the tab.

5. 3-hole punch the forms with the same pattern as the section divider pages so that all the elements align correctly.

Finally, assemble and enjoy being organized and ready for tax season!