

READY? SET. SAVE!

About half of all taxpayers choose to save at least some of their refunds.

How much could you save? This worksheet will help you decide.

- In general, I wish I had more money saved:
 - Agree
 - Disagree
- Select one:
 - I don't have specific plans to spend my refund. (Go to Question 3)
 - I already plan to spend some of my refund on _____.
That will cost about \$ _____. (Go to Question 4)
- I will save _____ of my income tax refund.
 - All
 - One-third
 - Half
 - One-fourth
 - \$ _____
- Complete the following:
Amount of my tax refund: \$ _____
Minus the amount I plan to spend: - \$ _____
The amount I will save: = \$ _____

What's Next?

<ul style="list-style-type: none">I have my savings account & routing information.I want to buy a U.S. Savings Bond.	Ask your tax preparer to complete IRS Form 8888.
<ul style="list-style-type: none">I don't have my savings account information.I don't have a checking or savings account.I want to receive a paper check from the IRS.	Take this form home as a reminder until your refund arrives.