



Save Some & Spend Some

On average, taxpayers just like you chose to save nearly half of their refunds last year. How much could you save? This worksheet could help you decide.

1. In general, I wish I had more money saved:

Agree

Disagree

2. 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)

3. I will save _____ of my income tax refund.

All

Half

One-third

One-fourth

\$ _____

4. Complete the following:

Amount of my tax refund: \$ _____

Minus the amount I plan to spend: - \$ _____

The amount I will save: = \$ _____

What's Next?

<p>I have my savings account and routing information. I want to buy a U.S. Savings Bond.</p>	<p>}</p>	<p>Ask your tax preparer to complete IRS Form 8888.</p>
<p>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.</p>	<p>}</p>	<p>Take this form home as a reminder until your refund arrives.</p>