

Sample article for organizations to use in reaching employees and customers (word count 263)

Provide the following helpful tips on record keeping in your communication vehicles

Managing your tax records after you have filed

There are many reasons to keep household records, including keeping track of your expenses, maintaining records for insurance purposes or getting a loan. You should have the same approach to managing your tax records.

You should keep all documents that may have an impact on your federal tax return. Records you should keep include bills, credit card and other receipts; invoices; mileage logs; canceled, imaged or substitute checks; proof of payments; and any other records to support deductions or credits you claim on your return.

Normally, you should keep these tax records for three years. It is a good idea to keep some documents longer, such as records relating to a home purchase or sale, stock transactions, IRA and business or rental property documentation. Keeping accurate records after you file your taxes will help you with documentation and substantiation if your tax return is selected for an audit.

You should also keep copies of your tax returns as part of your tax records. They can help you prepare future tax returns, and you will need them if you file an amended return. Copies of your returns and records can be helpful to your survivor or the executor or administrator of your estate. You may also need tax returns from previous years for loan applications, to estimate tax withholding or because records were destroyed in a natural disaster or fire. If your original tax returns were lost or destroyed, you can obtain copies or transcripts. There are three [options](#) for obtaining your federal tax return information – on the web, by phone or by mail.

NOTE TO EDITOR: Below are links to helpful recordkeeping tips on [IRS.gov](#).

- [IRS Tax Tip 2012-71](#) – Managing your Tax Records after you file
- [IRS Tax Tip 2011-19](#) – How to Get Your Prior-Year Tax Information from the IRS
- [Recordkeeping article](#) – ready-to-use - Recordkeeping makes sense, *especially when it comes to your taxes!*
- [Publication 552, Recordkeeping for Individuals](#)

IRS YouTube

How to Request a Copy Your Tax Return [English](#) | [Spanish](#) | [ASL](#)

On Twitter? Send these Tweets to your customers:

- Don't throw out those #IRS #tax_records <http://go.usa.gov/VjK> they may help you later!
- 5 tips from #IRS about keeping good records <http://go.usa.gov/VjK>.