

Maximize Your Refund

WITH THESE TAX TIPS

1. Increase Your Itemized Deductions

Review mortgage interest, property taxes, charitable gifts, and medical expenses to see if itemizing saves more than the standard deduction.

2. Adjust Your Withholding

Update withholding if you received bonuses, commissions, or extra income to avoid surprises.

3. Lower or Increase Your Income to Maximize Credits and Deductions

Time income and expenses strategically to stay within key tax thresholds.

4. Increase Your 401k/Traditional IRA Contribution

Contribute more to your pre-tax retirement plan to reduce your taxable income

5. Claim Your College Student Child

Review dependency rules to maximize education credits and filing benefits.

6. Contribute to your HSA

Save for future medical and healthcare expenses through Health Savings Account investment

7. Income (QBI) Deduction

Business owners may qualify for up to a 20% deduction – income limits apply.

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