

2017 Tax Season Checklist

It's the home-stretch to April 17th, so we've put together a checklist of important tasks to help you wrap up 2017 tax season:

Gather all of your documents

Your employer should have sent you your W2 by January 31st. If you invest, you probably need a 1099. Not sure what else? Follow the money trail! If you made income or had any gains, Uncle Sam wants to know about it. Don't forget - you can download all your [Wealthfront documents](#) on your dashboard.

Look for special situations in 2017

Check if any special situations apply to you that will cause you to pay more this year. For example, if you exercised stock options, you may have to pay estimated taxes.

Max out your 2017 IRA Contribution *before* April 17th

You may be able to [deduct IRA contributions](#) and get extra money back this year. Depending on your income and 401(K) participation, you may not benefit from contributions every year -- so make the most of it when you can. If you have a Wealthfront IRA or would like to open one, see [our contribution deadlines](#) here.



- Don't leave money on the table**

Made charitable donations? Track down those receipts. Installed a renewable energy source? [Check if you get a credit!](#) Bought a home, refinanced, or moved for work? These events often come with certain [tax deductions](#), so keep that in mind when filing.
- Leverage your harvested losses**

If you have a Wealthfront investment account, check if you have any harvested losses to use for this tax season or carry forward. [Learn how tax loss harvesting can help lower your tax bill.](#)
- Get expert help**

You might like to do it yourself, but with time ticking you might want to consider an accountant or a low cost software solution to help you file your taxes more efficiently. If you're a Wealthfront client, check out the [Tax Help Center](#) for some quick tips before sitting down with a professional office or getting started. Don't forget - as a Wealthfront client you can even get up to [\\$15 off your TurboTax filing!](#)
- Thinking ahead for 2018**

Most of us only think about taxes once a year when April starts to loom. But the tax code changed a lot recently. So [get informed](#) about the new tax bill now so you're not surprised next tax season.
- Got a refund?**

Treat yo' self to something nice! But as your adviser, we're inclined to help you understand how to make your refund help you towards your important goals. See what you could do with [your refund](#).



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