

NEXT STEPS AFTER FILING YOUR TAXES



You've completed your tax return! Now what? Fill out the following to continue planning for a financial goal.

- ← 1. Are you self-employed? Yes No
 - a. If yes, do you need assistance amending a return? Yes No
 - b. If yes, what was the business Income? \$ _____ Expenses? \$ _____
 - c. If yes, do you need help determining your annual income/expenses? Yes No
- ← 2. Have you back filed your taxes for the last three years? Yes No
 - a. If no, what year(s) are you missing? _____
- ← 3. I anticipate receiving a refund. Yes No
 - a. If no, do you anticipate owing taxes? Yes No
- 4. This is the anticipated amount I will receive for my refund. \$ _____

- ← Fill out before you file
- Fill out after you file

In the table below, write down three financial goals that you have and what amount from your refund will go towards that goal. Remember that your goals should be forward-thinking, passionately-held, and strengths-based. If you are having difficulty thinking about a financial goal, you can write down what you anticipate putting your refund towards and schedule a follow-up appointment with a financial coach to discuss further!

	← Goal	→ Amount from my refund that I will apply
Short-Term Goal (1-3 months)		\$
Medium-Term Goal (3-6 months)		\$
Long-Term Goal (6+ months)		\$
Total Amount from Refund Towards Goals		\$

UNHP can connect you with programs and activities that enhance your financial well-being.

Program or Activity	Pulling a Credit Report	Housing Connect	NYC Rent Freeze	Getting Ahead
How can this help?	Strong credit is key to obtaining loans, qualifying for housing, and accessing resources. By pulling your credit report, you can clear up old or current debts, ensure your personal information is up to date, and take action on repairing or building your credit over time.	Through NYC Housing Connect, you can apply for affordable housing in New York City, view current and upcoming housing opportunities, complete an application for your household, and apply to housing options for which you may qualify.	The NYC Rent Freeze Program helps those who are eligible stay in affordable housing by freezing their rent. A property tax credit covers the difference between the actual rent amount and what you (the tenant) are responsible for paying at the frozen rate.	UNHP offers a five session class, in which participants meet once per week for two hours. Graduates receive an individualized Financial Action Plan, access to a free credit report and score, access to Neighborhood Trust's Gateway Banking Package at participating Federal Credit Unions, and more!

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I am interested in discussing or learning more about...

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I would like to:

Meet with a Financial Coach

Date Scheduled _____ Name of Coach and Location _____

Sign up for an upcoming Getting Ahead Class

Date Scheduled _____ Name of Class and Location _____

Attend a Workshop or Event

Date Scheduled _____ Name of Program and Location _____

Before I attend, I will...

- Collect important documents (bank statement and tax return)
- Track my expenses
- Arrange for childcare
- Request time off from work
- Amend a previous year's tax return
- As a self-employed earner, calculate my annual income and expenses