FREELANCE TAX RESERVE REVIEW

Build the baseline

Write facts and sources before filling the main table. Do not guess at missing information.

Project or subject

Date or period

STEP 1 Enter a reserve target from your own appropriate source; no rate is assumed.

STEP 2 Record funds actually moved into the labelled reserve.

STEP 3 Keep the target source and transfer evidence for the next review.

STEP 4 Which fact or document still needs checking?

FREELANCE TAX RESERVE REVIEW

Keep a dated record

Record what actually occurred. Reprint this page whenever you need more rows.

Reference period

Review date

RECORD OR REVIEW DATE	RESERVE LABEL OR PERIOD	PERSON RESPONSIBLE	ENTERED RESERVE TARGET	FUNDS SET ASIDE	TARGET SOURCE AND TRANSFER REFERENCE

Outstanding question or record to confirm

FREELANCE TAX RESERVE REVIEW

Make the next step happen

Each useful action has an owner, a date and a result that can be checked.

ACTION 1 Enter a reserve target from your own appropriate source; no rate is assumed.

Concrete next action	Owner / due

ACTION 2 Record funds actually moved into the labelled reserve.

Concrete next action	Owner / due

ACTION 3 Keep the target source and transfer evidence for the next review.

Concrete next action	Owner / due

IMPORTANT CONTEXT

This organizer does not calculate tax due, recommend a reserve percentage or determine a filing obligation. Confirm requirements with a qualified source.

- [ ] Source checked
- [ ] Next action assigned