

Real Estate **Trusts**  
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**Accounting**  
**CPA** Compilations  
Tax Returns  
Manufacturing Succession

Our numbers are just right.



**REMINDER: Your W-3 (with W-2s attached) and your 1096 (with 1099-NEC attached) are due to the government by January 31, 2023.**

### Individual Tax Organizers Update:

The tax organizers have all been prepared and sent electronically via SafeSend or by mail. If you have not received your organizer by the 31st of January please contact our office at 651-641-1099.

If you received your organizer electronically you can upload your documents using the SafeSend link in the email. Please note, if you file Married Filing Jointly, and there are signatures needed, the primary tax payer will have to sign first and then the spouse will be able to sign.

We have compiled some tips to help you complete your electronic organizer as well as how to convert pictures to a pdf for better file quality. [Tips for completing your tax organizer electronically can be found in our FAQ on our website.](#)

### 2021-2023 Key Tax Amounts Comparative Key Tax Amounts

A schedule of comparative key tax amounts for the years 2021-2023 has been posted to our website [Follow the link to view the schedule.](#)

### JAK Educational Videos & Blogs

[SECURE Act 2.0 - Changes to Your Retirement Planning](#) by Andy Knutson, CPA

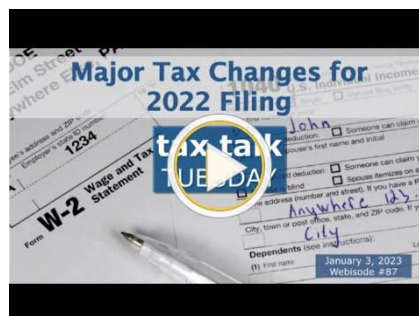
[Why You Should Think About Giving Big, NOW!](#) by Jonathon Lansink, CPA

[How Much Can I Gift Without Paying Taxes?](#) by Nick Benson

[Tips for Calling the IRS](#) by Nick Benson

[How to Improve your Household Budgeting](#) by Jonathon Lansink, CPA

[Major Tax Changes to 2022 Filing](#) by Alex Mathiowetz, CPA



You can subscribe to our [YouTube channel](#) to stay up on our latest educational videos and you can view all of our past blogs on the [Blog](#) page on our website.

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## Client Line

### Understand Your Cash Flow Statement

Managing cash is vital for running a successful business. That is why reviewing your company's cash flow statement regularly is so important. [Read Full Article](#)

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[Inheriting a House](#)

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[Updating Your W-4](#)

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