

# BALANCE SHEETS & BEYOND

Insight, advice, & guidance on tax news  
that matters to you & your business



## BUSINESS REMINDERS

- Forms W-3 (with W-2's attached) and 1096 (with 1099-NEC attached) are due to the government by **January 31, 2024**.
- Filing 10 or more W-2's **AND** 1099's combined? The IRS is requiring you to **file electronically**.

## Individual Tax Organizers Update

The tax organizers have all been prepared and sent electronically via SafeSend or by mail. If you do not receive your organizer by January 31, 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.

**IMPORTANT** - organizers can not be completed on a mobile device. They must be completed on a desktop computer.

**Married Filing Jointly?** Please note that there are signatures needed. The primary tax payer will have to sign first and then the spouse will be able to sign.

**Tips for Completing your Electronic Organizer!** We compiled some tips to help you complete your electronic organizer as well as how to convert pictures to pdf for better file quality.

[CLICK HERE for tips on completing your electronic organizer](#)

Top 5 things our clients appreciate about JAK:



01  
AVAILABILITY



02  
KNOWLEDGE



03  
PROACTIVE ADVICE



04  
COMMUNICATION



05  
EXPERIENCE

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## 2023 Client Satisfaction Report

**THANK YOU** to our clients for your feedback, thoughtful input and kind reviews!

[Click here to view the FULL REPORT.](#)

**2022-2024 Key Tax Amounts**  
Comparative Key Tax Amounts

## JAK Educational Videos & Blogs

[Pro Tips for Completing Your Paper Organizer](#) by Kristin Hanson

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

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

Subscribe to our [YouTube channel](#) to stay up to date on our latest educational videos! You can view all of our past blogs on our website [Resources](#) page.

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



## SMS Text Message Notifications!

We are now able to send a text message to remind you to electronically sign your tax returns via SafeSend (our electronic delivery method). This is a one-time reminder text. You will still receive email reminders until your signature has been executed.

You may also receive a text acknowledging we have received your signed tax documents and will e-file your returns.

If you prefer to not receive text notifications you can reply "STOP" at anytime.

## Client Line Healthy Money Habits

January turns our thoughts toward health. Have you considered your financial health? Let's review some healthy habits for 2024. [Read the Article](#)



### In this Issue:

[Don't Forfeit Your Solo 401\(k\)](#)

[Safety Deposit Boxes are Still Needed](#)

[Remember Keepsakes and Family Heirlooms in Your Estate](#)

[Are the IRS Enforcement Efforts Focusing on You?](#)

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