

BALANCE SHEETS & BEYOND

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



SafeSend Returns: User Tips

Now that we've been electronically delivering completed tax returns via SafeSend Returns, we wanted to provide some tips to make the process as easy as possible for our clients.

Remember - for those **married filing jointly**, the return will be delivered FIRST to the spouse listed as the taxpayer. After signing, the return will be delivered to the spouse.

#1: Whitelist our sending email address

Make sure to whitelist the email address noreply@safesendreturns.com (and check your spam/junk folder often). This is the email address your completed tax return will be delivered to you from.

#2: Opt in to receive a text message when your return is ready

Contact our office and request to receive text messages to alert you when your return is ready for viewing. You will also receive requested access codes via text to make accessing your return easier.

#3: Easily forward K-1's electronically (for returns with K-1's)

While navigating through your return, distribute K-1's by typing in each recipient's email address. You will be able to see when the recipient downloads, and even resend if necessary. These email addresses will hold year over year.

#4: Save the link to access your return

By saving this link, you can securely forward a copy of your return when requested by your banker or financial advisor. When you need to do this, open the link, go through the process to receive your access code, and click the "forward" button.

For more tips and better user experience visit:

[JAK+Co. Frequently Asked Questions](#)

[SafeSend Returns Client Experience](#)

JAK Educational Videos & Blogs

[Understanding Non-Compete Agreements in Minnesota: A Legal Update](#) by guest author Matthew Hartranft

[Wills vs. Trusts: Choosing the Right Path for Your Estate](#) by Rachel Schromen and Melissa Miroslavich

Subscribe to our [YouTube channel](#) to stay up to date on our latest educational videos!

[The Knutson Kronicle - Looking Back at 2023](#)

Click on the image below to see what was happening at JAK+Co. in 2023!

You can view all of our past blogs on our website [Resources](#) page.



Individual Tax Organizer Reminders

The tax organizers have all been prepared and sent electronically via SafeSend or by mail. If you have NOT received your organizer, 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.

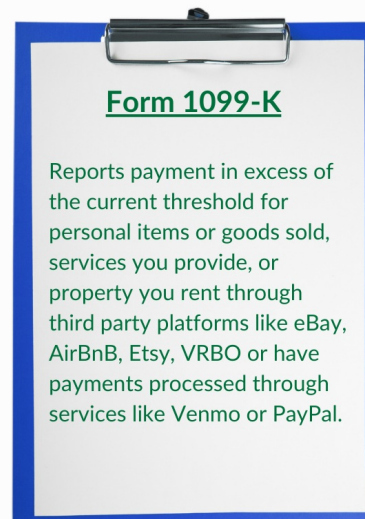
[CLICK HERE for tips on completing your electronic organizer](#)

Client Line IRS Delays Online Sales Rule

The IRS is delaying enforcement of services and online sales income reporting. Here's who will be affected by the lower threshold next year: [read the article](#).

In this Issue:

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[When You Can't or Shouldn't Claim the Standard Deduction](#)
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