

# BALANCE SHEETS & BEYOND

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



*Tax day is now behind us, time to take a breather.*

## Getting a Refund?

[IRS: Where's my refund](#)

[MN: Where's my refund](#)



## JAK Educational Videos & Blogs

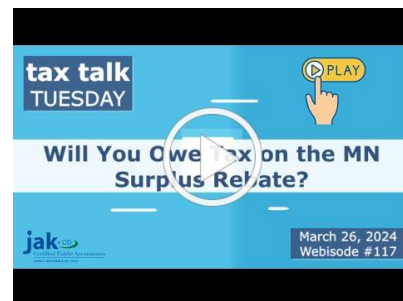
[Which Accounting Method is Right for Your Contracting Business?](#) by Logan Kalis

[Top Tips for New Accounting Grads from JAK + Co Accountants](#) by Hunter Hartwick

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.

## Will You Owe Tax on the MN Surplus Rebate?

Did you receive a MN tax rebate due to the 2023 budget surplus? If so, you'll want to listen to this Tax Talk Tuesday webisode, as you may be taxed on that rebate.



## Client Line News

### A Benefit Plan from B to Z

For companies whose employees span 4 generations, a single benefit plan doesn't work well for everyone.

More employers are starting to offer multi-generational benefit packages. [Read the article.](#)

### In this Issue:

- [What You Need to Know About IRA Rollovers](#)
- [Claiming Deductions for Volunteer Work](#)
- [Returning to Work After Receiving Social Security Benefits](#)
- [Too Young to Need Life Insurance?](#)



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**Due Dates to Remember:**

- June 17 - 2024 Quarter 2 Estimates
  - August 15 - 2023 MN Property Tax Return
  - September 16 - 2024 Quarter 3 Estimates
  - September 16 - Extended 2023 Forms 1120S, 1065
  - September 30 - Extended 2023 Form 1041
  - October 16 - Extended 2023 Form 1040, 1120C
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