

BALANCE SHEETS & BEYOND

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



Summer Hours July 1, 2024 - August 31, 2024

Monday - Thursday 8:00am - 5:00pm
Friday Closed

Please use our drop box by our front door at the Falcon Heights location to drop documents off outside of these hours.
Or use this [link](#) to securely upload documents.

A large graphic with a green banner at the top that says "Welcome" in white and "NEW STAFF" in blue on a white background. Below the banner are eight circular headshots of new staff members, each with a green nameplate below their photo containing their name, title, and location.

Name	Title	Location
CALEB	Accounting Intern	Falcon Heights
CLAYTON	Staff Accountant	Falcon Heights
ESTHER	Staff Accountant	Falcon Heights
MADISON	Staff Accountant	Rogers
PAYTON	Staff Accountant	Rogers
RUTHANN	Senior Accountant	Rogers
SUE	Director	Rogers
VICTOR	Staff Accountant	Falcon Heights

JAK Educational Videos & Blogs

[What to Consider When Structuring Your Stock Ownership Transition](#)

by Kyla Hansen

[The Perks of Practicing Public Accounting at a Local Firm](#)

by Kyle Sturgeon

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.

Leftover 529 Funds - Educational Potential

Q. Can I change the beneficiary of a 529 plan if there is money leftover after my child or grandchild finishes school?

A. Yes, changing the qualified beneficiary of a 529 plan is an option if there are remaining funds after the original beneficiary completes their education.

Learn more in our Tax Talk Tuesday video below!



Client Line News

Do You Feel Wealthy?

What does wealth mean to you? This financial study found that feeling wealthy isn't only about actual dollars. Here's a snapshot of the results- [read the article](#). (The full study can be viewed [here](#))

In this Issue:

[Clean Out Your Subscriptions](#)

[Cash Balance Plans: What's Your Advantage?](#)

[Set Your College Grad on the Path to](#)

[Becoming a Millionaire](#)

69%

Heathy
Work-Life
Balance

67%

Generous
with Family

63%

Good
Health

37%

Being
Successful

33%

Leaving an
Inheritance

31%

Maximizing
Earnings

Due Dates to Remember

August 15

2023 MN Property Tax Return

September 16

2024 Quarter 3 Estimates

Extended 2023 Forms 1120S, 1065

September 30

Extended 2023 Form 1041

October 16

Extended 2023 Form 1040, 1120C

We Are Hiring

Attention all number crunchers - **JAK + CO IS HIRING!**

Are you an accounting student, graduate, or a current CPA?

We'd love to welcome you to our mid-sized firm. If you know others who may be interested, share this information!!

[Click for Current Career Openings](#)

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