

# BALANCE SHEETS & BEYOND

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



## Avoid Tax Surprises A CPA's Role in End-of-Life Planning

A collaborative educational event hosted  
by Schromen Law and JAK + Co.  
Learn how tax rules impact what happens  
to your estate when you die.



RSVP HERE

October 24 at 5:00  
Schromen Law, LLC  
319 Ramsey St.  
St. Paul, MN  
55102

### YOU'RE INVITED

to our free seminar  
in partnership with [Schromen Law, LLC](#).

During your life, it is vital to create an estate plan that works the way you want it to when you die. If you'd prefer your assets go to your loved ones rather than the Federal & State government, consider learning the rules TODAY!

[Cynthia McLagan, EA](#) & [Jonathon Lansink, CPA](#) of JAK + CO will share the intricacies of planning for estate tax, income tax, gift tax, & the inheritance of assets for a deceased loved one.

When: Thursday, October 24 from 5:00-6:00pm

Where: [Schromen Law, LLC at 319 Ramsey St., St. Paul, MN 55102](#)

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## JAK + CO Educational Videos & Blogs

[Don't Miss These Tax Benefits for School Supplies](#) by Jason Loven, CPA, CCIFP [Accrual vs. Cash: Which Basis of Accounting is Best for Your Business?](#) by Ethan Cummings, CPA and Luke Palmer, CPA

[Understanding and Mitigating Fraud Risks in the Construction Industry](#), by Kyle Sturgeon, CPA, MBA

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

## The Educator Expense Deduction Applies Again This Year



## ClientLine News

### Time for a Family Limited Partnership

Thinking about long-term wealth protection? You might want to consider a Family Limited Partnership (FLP) for your business. Learn how this strategy could benefit your family's financial future by [reading the article](#).

[In this Issue: Financial Tasks for September](#)  
[How Do Men and Women Differ in Investing?](#)  
[More Than Inflation Can Impact Your Investments](#)  
[What Homeowners Insurance May Not Cover](#)



## Due Dates to Remember

### **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!!

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