

BALANCE SHEETS & BEYOND

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



We are proud and honored to have been nominated for the **Twin Cities Business: Best of Business Reader's Choice in the Accounting Firm category**. The awards ceremony was early August where we accepted the **GOLD** award.

Thank you to all of our staff, clients, partners, friends and family. It was a fun event and we're eager to continue serving the Twin Cities and surrounding areas.



JAK Educational Videos & Blogs

[Wills vs Trusts](#), Guest Authors

[Don't Leave Your Health Care Directive Out of Your Estate Plan](#), Cindy McLagan, EA, MIM

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.

Are Life Insurance Proceeds Taxable?



Client Line News

Tax Planning for Small Businesses

What do wine, cheese and balsamic vinegar have in common with certain tax breaks? The answer is

in the article.

In this Issue: [Avoid the Third Generation "Curse"](#)

[Tracking Relative Return](#)

[Communicating with Gen Z Employees](#)



Due Dates to Remember

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!!

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