

BALANCE SHEETS & BEYOND

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



Individual Tax Organizers Have Been Sent

The tax organizers have all been prepared and are in the process of being sent electronically via SafeSend or by mail depending on your preferences. If you do not receive your organizer by January 31, please contact our office at 651-641-1099 or jak@jakcpa.com.

If you received your organizer electronically, you can upload your documents using the SafeSend link in the email.

IMPORTANT!! - organizers cannot 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 get an email to sign first and then the spouse will receive an email and 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 for Tips to Complete Your Electronic Organizer With SafeSend Organizers](#)

[Click for Tips to Complete Your Paper Organizer](#)

New for 2025: SafeSend One Client Portal

We are pleased to offer our clients the SafeSend One Client Portal as a way for you to keep your tax documents, and manage any action items, all in a central location.

- When you receive your first email from John A. Knutson & Co., PLLP's SafeSend email, noreply@safesendreturns.com, you will be able to create your client portal log in. Keep this information handy as JAK + CO does not have records of your username and password.
- Add our SafeSend email address, noreply@safesendreturns.com, to your safe list to prevent it from being categorized as spam or junk.
- Bookmark the client portal log in url. [Or click here](#) to access directly.
- For the best browser experience, we recommend using Google Chrome.

Please review the steps in this article to **learn how to create and manage your account** [Client Portal Experience](#). Alternatively, you can choose to watch a [4-min video tutorial](#) if you prefer.

Benefits of using SafeSend One Client Portal:

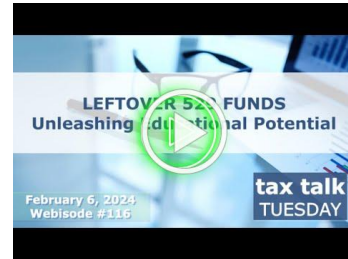
- All of your outstanding tasks are organized in a list so you can efficiently manage and complete your tasks.
- Access, view, and download all files received or uploaded through SafeSend One.
- Receive proactive reminders and notifications directly from the portal.
- Easily track and manage your K-1 distributions and tax payment vouchers.

JAK + CO Educational Videos & Blogs

- [Tax vs Attest: a Day in the Life of Two Senior Accountants at JAK + CO](#) by Caleb Matros
- [What to Consider When Structuring your Stock Ownership Transaction](#) by Kyla Hansen
- [Pro Tips for Completing Your Paper Organizer](#) by Kristin Hanson

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!

Extra Funds in a 529 Plan?

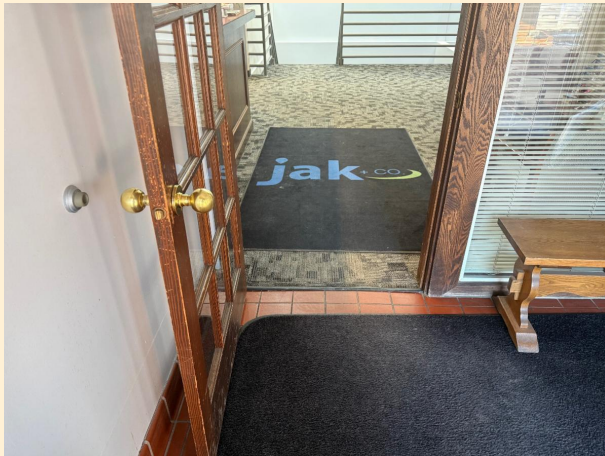
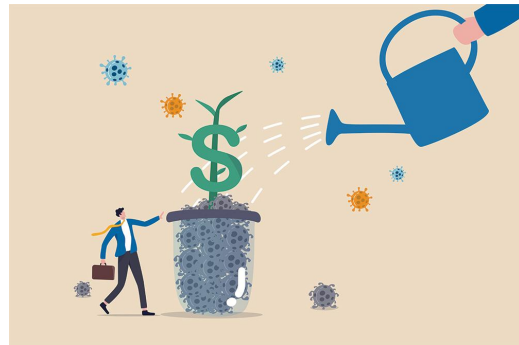


ClientLine News

Revive Your Retirement Funding Strategy

Is it time to revive your retirement funding strategy? Whether you're behind on contributions or want to maximize your retirement savings in 2025, this short article gives you a minute to look at getting back on track. [Read the article](#)

In this Issue: [Get Prepared for Tax Time](#)
[Stick to the Basics](#)
[6 Ways to Find More Money to Budget](#)



Tax Season Office Hours January 15 - April 15

Monday - Friday
8am - 5pm

Saturday
9am - 1pm

[Click Here to Contact
JAK + CO](#)

Due Dates to Remember

January 31 2024 Q4 Payroll Filings

January 31 W-2's & 1099-NEC's

February 28 1099-INT, DIV, MISC's
March 17 Tax Returns or Extensions
for S Corporations & Partnerships

April 15 Individual Tax Returns, 2025
1st quarter estimated tax

Work with Us

Attention accounting professionals, CPAs and accounting graduates! **JAK + CO IS HIRING!** You can peruse current openings at the link below.

We'd love to welcome you to our mid-sized firm. If you know others who are looking, please share this information!

[Click for Current Career Openings](#)

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