

BALANCE SHEETS & BEYOND

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



Individual Tax Organizers - when to expect them

The tax organizers are being prepared and will soon be sent electronically via SafeSend Gather 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're receiving your organizer electronically, you can upload your documents using the SafeSend link in the email. The email will be from John A. Knutson & Co., PLLP noreply@safesendreturns.com.

IMPORTANT!! Organizers cannot be fully completed on a mobile device. However some parts can be completed on your mobile device. These include: signing engagement letters, completing custom questions and uploading source documents.

Married Filing Jointly? Please note that both the taxpayer and spouse will get an email specific to them and will each need to sign the engagement letter.

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.

[Tips for Completing Your Electronic Organizer](#)

[Tips for Completing Your Paper Organizer](#)

SafeSend Client Guides

Below are links to SafeSend guides and resources to help you send, access, and download your tax documents. We understand that technology can sometimes be frustrating, and we want to make sure your documents are both secure and accessible when you need them. If you have any questions or run into any issues, our team is always happy to help.

[SafeSend Returns & Portal Client Guides](#)

[SafeSend Gather Client Guides for Organizers](#)

[**Click Here for 2024-2026 Key Tax Amounts**](#)



ClientLine News: Smart Tips

[How to Lower Estate Taxes Through Gifting](#)

This sample scenario illustrates giving to family members without triggering gift taxes. [Read the article](#)

Also In this Issue:

[Family Tax Credits](#)

[Ways to Trim Tax on Investments](#)

[Business Deductions](#)

[What are Taxable Fringe Benefits](#)



John A. Knutson & Co. Authored Articles

[Prepping to Sell a Business: What to Do 3+ Years Before an Exit](#)

by Nate Graf, CPA

[The Instant Inheritance: An Estate Planning Tool to Bypass Probate](#)

by Cindy McLagan, EA, MIM

[Tax Management 101: Essential Tips for Small Businesses in Minnesota](#)

by Chris Bertz, CPA, MBT

Due Dates to Know

[January 31](#) 2025 Q4 Payroll Filings
[January 31](#) 2025 W-2's & 1099's sent

[March 16](#) 2025 1120S, 1065 Business Tax

[April 15](#) 2025 Individual tax, C-corporation tax
[April 15](#) 2026 1st qtr estimate payment

Office Hours

January 15 - April 15

Monday - Friday
8am - 5pm (Falcon Heights)
9am - 5pm (Rogers)

Saturday
9am - 1pm (Falcon Heights)
By appointment (Rogers)

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