

BALANCE SHEETS & BEYOND

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



JOHN A. KNUTSON & CO., PLLP
100 YEARS OF TRUST

Spring Cleaning Your Tax Document & Files? Start with these Record Retention Guidelines

After your tax return is filed, it can be tempting to tuck everything away or toss documents you no longer think you need. However, retaining supporting tax return documentation is an important part of protecting yourself or your business in the event of questions, amendments, audits, estate matters, or future planning needs.

To help you stay organized, we've prepared helpful record retention guideline pages for personal, businesses, and estate records. These pages provide a quick reference for how long to keep common documents and when permanent retention may be recommended. Please keep in mind these are general guidelines, and your specific situation may call for a different approach.

[View our Record Retention Guidelines Below:](#)

Personal

Business

Estate



You're Invited!

We're excited to welcome you to our new Rogers office! Yes, we outgrew our previous Rogers space.

This Wednesday, May 20 from 3:00-5:00pm @ 21330 John Milless Drive, Suite 101 Rogers, MN 55374

Join us for a relaxed and fun open house to connect, explore our space, and spend time with our team & colleagues.

[Click Here for More Information](#)

[Click Here to Add to Your Calendar](#)



ClientLine News: Smart Tips

529 College Savings Plan To Minimize Taxes

A 529 college savings plan* is a popular way for families to save for higher education expenses while enjoying significant tax advantages. This article shares how to maximize the benefits:

[Read the article](#)

Also In this Issue:

- [Start You College Grad's Financial Wellness Path](#)
- [Budget Friendly Gardening Tips](#)
- [Savvy New Car Shopping Tips](#)
- [Top Summer Travel Destinations](#)



JOHN A. KNUTSON & CO., PLLP

John A. Knutson & Co. Authored Articles

[The Role of Income-Based Valuation in Business Decision-Making](#)

by Nate Graf, CPA

Getting a 2025 Refund?

[IRS: Where's my refund](#)

[MN: Where's my refund](#)

Due Dates to Know

June 15 2026 2nd quarter estimated tax

July 31 2026 Q2 Payroll Filings

August 15 2025 MN Property Tax Return

September 15 2026 quarter estimated tax, 2025 extended 1120S, 1065

September 30 2025 extended 1041

October 15 2025 Extended 1040, 1120

October 31 2026 Q3 Payroll Filings

Follow us on:



review us on

[Visit our Website](#)

John A. Knutson & Co., PLLP | 1781 Prior Avenue North | Falcon Heights, MN 55113 US

[Unsubscribe](#) | [Update Profile](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!