

BALANCE SHEETS & BEYOND

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



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



Hear From Our Experts

R&D Tax Credits Explained: What Business Owners Commonly Miss

Two members of the John A. Knutson & Co. team recently joined the [KeyeStrategies](#) Poised for Exit podcast to talk about R&D tax credits and opportunities businesses may be overlooking.

In the episode, [John Ammann, CPA, MPAC, MBT](#) and [Tim Urban, CPA, MBT](#) break down common misconceptions about the R&D tax credit, the types of activities that may qualify, and what business owners should know when determining whether their company could benefit.

[Listen to the Podcast](#)



ClientLine News:

Is a Roth IRA a Good Fit For Your Goals

Traditional and Roth individual retirement accounts are both solid options for retirement savings. A Roth IRA offers tax advantages when you withdraw your funds, while contributions to a traditional IRA are tax-deferred until you take distributions. Comparing both IRA options can help you make an informed decision.

[Read the Article](#)

Also In this Issue:

- [Business Interest Deduction](#)
- [Health Savings Accounts and OBBBA](#)
- [Don't Fear Capital Gains Tax](#)



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Authored Articles

[Which States Have an Estate Tax? A State-by-State Overview](#)
by [Jonathon Lansink, CPA, CFP®](#)

[Gifting, Simplified. Part 1 of 3. What Counts as a Gift? A Simple Guide to Gift Types](#)
by [Cynthia McLagan, EA, MIM](#)

[Smart Tax Planning in Retirement. Part 1 of 2. The RMD You Didn't Ask For & the Tax Bill That Comes With It](#)
by [Matt Mikel, CPA, CFP®](#)

Due Dates to Know

September 15: 2026 quarter 3 estimated tax, 2025 extended 1120S, 1065

- [Save For Retirement or College Flow](#)
- [Importance of Managing Cash Flow](#)

September 30: 2025 extended 1041
October 15: 2025 Extended 1040, 1120
October 31: 2026 Q3 Payroll Filings

Calling All Business Owners

Build smarter. Prepare earlier. Exit stronger.

The next **Owners Edge Summit** is **Thursday, October 8th** from 12:00-6:00 PM CDT — bringing business owners and decision-makers together for an afternoon focused on building value, making proactive decisions, and preparing for what's next.

John A. Knutson & Co., PLLP is highly involved with this summit and will be there to discuss ideas for improving your business now and planning for the future.



OWNER'S EDGE SUMMIT

WHY ATTEND THE OWNERS EDGE SUMMIT

- Hear successful business owners share real-life stories
- Join peer-level discussions
- Network with like-minded business owners & leaders
- Walk away with practical frameworks you can use
- Get clear perspective from trusted advisors & resources

Save the date:

Thursday, October 8th
12:00-6:00 PM CDT

Mendakota Country Club.

👉 Registration is open.
Reserve your spot today!

Ask us for a code to waive the registration fee.

[Register Here](#)

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

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