



## 2024 Tax Filing Season - General Information

Hello and Happy 2024!! Here are some general notes and due dates, etc... Thanks 😊

### DUE DATES

To commit to an on-time filing, I need to have **100%** of the relevant source documents **in hand by the end of the month that precedes the filing deadline**. If you prefer just to extend the filing, let me know and I'll file an extension.

- Partnerships and S-corporations 15 March 2024 (Extension until 9/16/24)
- C-Corporations 15 April 2024 (Extension until 10/15/24)
- Individuals 15 April 2024 (Extension until 10/15/24)
- Nonprofit Organizations 15<sup>th</sup> Day of 5<sup>th</sup> Month after Close of Tax Year (6-month extension)

### EXTENSIONS

- If I have everything in hand by the end of the month that precedes the filing deadline, I am committed to getting the work done for an on-time filing.
- If I receive your engagement agreement and tax information after that month-end, I will do my best to file on time, and will file an extension if I'm unable to finish.
- Note that extensions give you more time to file the return, but do not delay the payment deadline. If your personal return is extended, you may wish to make an April payment to mitigate owing penalties and interest on a past due payment.

### MEETINGS

- I'm happy to meet over Google Meets (or just phone) to walk through your return with you. Please suggest a couple of specific dates/times that work well for you, and I'll do my best to accommodate your schedule. The more specific, the better.

### MAILING

- If you'd like to mail tax information to me, contact me separately for instructions.

### PAYMENTS

- Please note I'm no longer able to accept checks or cash as payment for services. Plan to use a debit card, credit card, or PayPal.

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