

January

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15 X	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31 X	

X 01/15/2020 DUE DATE:
Final 2019 estimated tax payment due

X 01/31/2020 DUE DATE:
Mail or distribute W-2s & 1099s to recipients

02/17/2020
ALL S CORPORATION & PARTNERSHIP INFO DUE TO OUR OFFICE

February

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

March

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16 X	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

X 03/16/2020 DUE DATES FOR S CORPORATIONS & PARTNERSHIPS:
-payments
-tax returns or extensions
-first 2020 estimated tax payments

03/23/2020
ALL PERSONAL, ESTATE & C CORPORATION INFO DUE TO OUR OFFICE

April

S	M	T	W	T	F	S
			1 X	2	3	4
5	6	7	8	9	10	11
12	13	14	15 X	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

X 04/01/2020
Any outstanding information due to our office

X 04/15/2020 DUE DATE FOR INDIVIDUAL & PARTNERSHIPS:
-payments
-tax returns or extensions
-first 2020 estimated tax payments



Don't Forget:

- SSNs and dates of birth for all family members (including any children born in 2019)
- Original W-2s & 1099s (interest, dividends, retirement or other income)
- Cost basis for stocks sold
- 1098(s) (mortgage interest)
- Real Estate Taxes and Car Taxes Paid
- Business & Rental Income and Expenses (email us to request a helpful organizer!)
- Legal Docs for sale or purchase of real property
- Other Itemized Deductions (i.e. donations & medical)
- Form 1095 (Healthcare Coverage)
- K-1(s) from businesses, estates/trusts, & investments
- Contributions to pension or retirement plans
- Amounts & Dates of any estimated taxes paid
- Void Check for Direct Debit or Deposit



You Should Know:

- Preparation fees are due before your tax return is e-filed
- Returns are processed in the order they are received
- Optional audit correspondence is available
- E-filing is mandatory
- You must contact us to request an extension; taxes due must be paid with the extension
- Call to request a tax organizer
- It is your responsibility to review all returns before signing
- You can upload your tax documents to our secure portal!
- **Never Email SSNs or Bank Information**