



January

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	30
31						

✘ 01/15/2021 DUE DATE:
Final 2020 estimated tax
payment due

**✘ 02/01/2021
DUE DATE:**
Mail or distribute
W-2s & 1099s
to recipients

02/22/2021
**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						

March

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	30	31			

**✘ 03/15/2021
DUE DATES
FOR S CORPORATIONS
& PARTNERSHIPS:**
-payments
-tax returns or extensions

03/22/2021
**ALL PERSONAL, ESTATE & C
CORPORATION INFO DUE
TO OUR OFFICE**

April

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	30	

✘ 04/01/2021
Any outstanding information due
to our office

**✘ 04/15/2021
DUE DATE FOR INDIVIDUAL &
PARTNERSHIPS:**
-payments
-tax returns or extensions
-first 2021 estimated tax payments



Don't Forget:

- SSNs and dates of birth for all family members (including any children born in 2020)
- 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**