



# Calendar of Services

## JANUARY

1099s  
Tax Organizers  
Prior Year-End  
Review of Books

## FEBRUARY

Corporate Tax  
Returns  
  
Deadline to Have  
Corporate Tax Info in  
is Feb 1

## MARCH

Corporate &  
Personal Tax  
Returns  
  
Deadline to Have  
Personal Tax Info in is  
March 1

## APRIL

Finish Personal  
Tax Returns  
  
1st Tax Payment  
Due

## MAY

Annual Reports  
are Due May 1st  
  
Summer Meetings  
Begin

## JUNE

2nd Tax Payment  
Due  
  
Summer Meetings  
Continue

Tax Season

Special Projects

## JULY

Financial Review  
of All Accounts  
Begin

## AUGUST

401K setups start  
for the next year

## SEPTEMBER

3rd Tax Payment  
Due

## OCTOBER

Tax Planning  
Meetings Begin  
  
Deadline to get  
401Ks set up

## NOVEMBER

Tax Planning  
Meetings continue  
  
Fall Financial  
Meetings

## DECEMBER

Final Month to  
implement Tax  
Saving Strategies

Financial Review

Tax Planning