



UPCOMING DEADLINES:

2nd QTR ESTIMATED TAX PAYMENTS DUE: 06-15-26

TAX EXTENSION DEADLINE: 10-15-26

Worried about your Extension?

The stigma around extensions persists, among practitioners and clients. But, really an extension is often the most ethical choice available. Instead of rushing your return to meet an artificial deadline, filing an extension allows us to carefully review your documents and ensure your return is accurate. Extensions provide time for accuracy, reflection, and importantly, better outcomes for YOU.

Preparation for 2026 Tax Year

Did you have an unexpected balance due this tax year? Don't go into the next tax year and receive the same outcome! Updating W-2 withholdings allows taxpayers to align tax payment with current tax law changes and increased standard deductions, preventing excessive withholding or not enough. To adjust withholding, taxpayers should use the [IRS Tax Withholding Estimator](#) to determine necessary adjustments, complete a new Form W-4, and submit it to their employer.

Who should use the estimator?

In addition to those who want to adjust their withholdings, taxpayers who may benefit from using the estimator include those who:

- Have one or more jobs or a working spouse
- Experienced a major life change recently, such as marriage, divorce, the birth or adoption of a child
- Claim credits such as the Child and Dependent Care Credit or Adoption Credit
- Itemize deductions, including mortgage interest or charitable contributions.
- Receive income without automatic tax withheld, such as gig, freelance, or investment income.
- Owed additional tax or received a larger-than-expected refund during their most recent filing season.

Contact us to schedule an appointment.

THANK YOU FOR YOUR CONTINUED BUSINESS ~ WE COULDN'T DO IT WITHOUT YOU!

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