End Year Tax Checklist

A Checklist with reminders, dates, and to-do's to help you make tax season a breeze.

We want to say Thank You.

Hello Client,

As the year-end approaches, we want to take this opportunity to say Thank you! Thank you for allowing us to serve you. 2020 has taught us many things but the most important in our firm is important it is to serve with kindness and Integrity. Covid-19 has taught us to appreciate the things we often take for granted" shelter, food, water, people, jobs, shops, theatres, work, education, gyms, activities....freedom.

Corona has taught us to treasure our health and our lives.

Also has taught us that our connections are precious -the ones we have with our loved ones, and also the ones we have with ourselves. I pray that you enter the year with blessings and expectations to grow to your fullness. A lot has changed and we want you to be the first to know. Our office had to close down due to Covid-19 and we have been functioning 100% virtual and will continue to do so going forward.

Now you may ask what does that mean for you as our individual clients and business clients we will continue to schedule an appointment through Zoom it's important to start scheduling your appointments early. You will receive an email to our secure portal to scan your documents and communicate with us.

A lot has changed this so please don't wait until the last minute to schedule your appointment.

Tax Season Checklist

Tax season is often a stressful time of the year for business owners and things are usually completed at the last minute.

It doesn't have to be that way.

Make 2022, the year that taxes are easy and you can focus on your business. Here are some tips
to help ease that process.

- [ ] **Keep good records of necessary tax items**
  - Expense Receipts - Keep on file in the event we need them down the road.
  - Bank and Credit Card Statements - Put them on file if needed in the future.

- [ ] **Log in to our Client Portal**

  We will be sending you an invite to Link at the beginning of January. Log in and start answering the questions and upload all tax-related documents to Serenity as you receive
  them.

  Some of the items to consider are:
  - Last Year's Tax Return (For first time Serenity filers)
  - Payroll Documents
  - Various Forms: W2, 1099, Student Loan Interest, Mortgage Interest, Real Estate

  Taxes
  - Medical Expenses
  - Charitable Contributions
  - Child Care Expenses
  - Estimated Taxes Paid

Communicate with us

- Communicate any and all tax concerns with a member of the Serenity Group team so we can ensure they are taken care of.

2022 Tax Season Due Dates

January 18, 2022

- 4th Quarter 2020 Estimated Tax Payments Due

February 1, 2022

- 1099-NEC/MISC Forms Due

March 15, 2022

- S-Corporation Tax Returns (or extensions) Due
- Partnership Tax Returns (or extensions) Due
- Multi-Member LLC Tax Returns (or extensions) Due

April 15, 2022

- Personal and Single Member LLC Tax Returns (or extensions) Due
- C-Corporation Tax Returns (or extensions) Due

SERENITY FINANCIAL SERVICES

From Abby, Your Accountant

Of course, if you have any questions, please reach out to our office. Thanks for another great year and we wish you all the best as you embark on 2022!

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