
September 2018 Tax Tips

Helping you to earn more,
and keep more of what you earn.



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Don't miss these important upcoming tax deadlines

Did you know there are several important tax deadlines coming up between now and the end of the year? Check the list below to see if any apply to you or your business:

Sept. 17 -

- *Third-quarter installment of 2018 individual and corporation estimated income tax is due.
- * S corporations: Filing deadline for 2017 tax returns for S corporations with automatic six-month extensions.
- * Partnerships: Filing deadline for 2017 tax returns for partnerships with automatic six-month extensions.
- * Electing large partnerships: Filing deadline for 2017 tax returns for electing large partnerships with six-month extensions.

Oct. 1 - Deadline for self-employed individuals and small businesses to establish a SIMPLE IRA plan for 2018.

Oct. 15 - Filing deadline for 2017 individual or C corporation income tax returns with automatic six-month extensions. Pay taxes by this date.

REMINDER: Taxpayers with required minimum distributions

Don't forget to take your 2018 required minimum distribution (RMD) from an IRA or other retirement plan by Dec. 31.

If you don't withdraw before 2019, you'll face a penalty of 50 percent of the required withdrawal not taken.

Call if you have questions or need filing assistance.



Planning how to use Section 529 funds?

Don't forget the tax rules if you plan on withdrawing money from a Section 529 savings plan. Here are a few considerations:

* **Expenses must be for education.** The qualified distributions of funds you withdraw are tax-free as long as they are used to pay for college tuition, room and board, computers and other qualified education expenses.

* **Elementary and secondary school tuition now counts.** As a result of recent tax law changes, Section 529 plan funds can be used for up to \$10,000 in tuition expenses for elementary and secondary schools.

* **529 plan funds can be rolled into an ABLÉ account.** You may roll over money from a 529 plan to an ABLÉ account for a child who has special needs (as long as both accounts are for the same beneficiary). You may roll over up to the annual contribution limit of \$15,000.

This new option may be especially helpful for a family that started saving for child's college education but now aren't sure they'll go to college because of a disability.

Call for more information. We can help you make sure you're taking the most tax-effective steps when using your Section 529 plan distributions.

Current Office Hours:

Monday - Thursday 8 am - 5 pm

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