



# Completax *Planning Inc.*

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January 2024

## Reminders & Important Deadlines

### **March 15 2024:**

S Corporate 1120S & Partnerships  
1065 Tax Deadline

### **April 15, 2024:**

Individual 1040 & C-Corp 1120  
Tax Deadline

### **June 17, 2024:**

Federal & State Second Quarter  
Estimated Tax Payments Due

### **September 16, 2024:**

S Corporate 1120S & Partnerships  
1065 6 Month Filing Extension  
Ends

### **September 16, 2024:**

Federal & State Third Quarter  
Estimated Tax Payments Due

### **October 15, 2024:**

Individual & C-Corp 6 Month  
Filing Extension Ends

## Hours of Operation

If you intend to visit the office, we ask that you make arrangements with us prior to visiting. We can be reached at the office Mondays, Tuesdays, and Thursdays. If you require us to come to you, please plan for a Wednesday or Friday.

## Tax Organizers

If you're receiving this by mail, your tax organizer is attached. Please complete the tax organizer and return it to us. Please attach any official income tax forms that you receive such as form W-2, 1099-NEC, 1099-Misc, 1099-B, 1099-Int, 1098, 1098E, etc.

## SmartVault

If you are interested in saving on postage, gas, paper, ink, toner, etc., please consider utilizing our new SmartVault client portal to upload your completed tax organizer and supporting documents. If you have not received a link from us and would like to explore this option, feel free to give us a call. However, if you don't have access to a smartphone, computer, or scanner, we are more than happy to continue accommodating your paper and mailing needs.

## Payments

Once you have reviewed your completed tax return, we kindly request that you settle your invoice upon returning your signed e-file authorization. We will proceed with filing your return once the payment is received. If, for any reason, payment cannot be made at the time of completion, please inform us so that we can explore alternative arrangements.

## Annual Retirement Contribution

2023:

401(k), 403(b), 457: \$22,500 (\$30,000 for age 50+)  
IRA, ROTH IRA: \$6,500 (\$7,500 for age 50+)  
SIMPLE IRA: \$15,500 (\$19,000 for age 50+)  
SEP IRA: \$66,000

2024:

401(k), 403(b), 457: \$23,000 (\$30,500 for age 50+)  
IRA, ROTH IRA: \$7,000 (\$8,000 for age 50+)  
SIMPLE IRA: \$16,000 (\$19,500 for age 50+)  
SEP IRA: \$68,000