



- Brought to you by Kat Cannon



Jake Lincoln
firm partner

"Never put off till tomorrow what may be done the day after tomorrow just as well."

-Mark Twain

The spring tax season is always our busiest time of the year. With multiple important deadlines having a good team to work with is important. Our team understands that tax laws can be complex and confusing, which is why we stay up-to-date with the latest changes and regulations. We strive to make the tax preparation process as easy and stress-free as possible for our clients.

prepping for the 2024 spring tax season

WORD OF ADVICE?



Month to Month Info

<https://coastaltaxadvisors.com/tax-and-accounting-blog/>



Lisa Novotny
office manager
"ORGANIZE"



Randy Fuller
tax accountant
"COMPLETE"



Kat Cannon
admin
"PROMPTNESS"



A regular tax season in Summary

5

five major deadlines to look out for

- January 16, 2024 - 4th Quarter 2023 estimated tax payment due.
- January 31, 2024 - Due date for employers to send W-2 forms and certain 1099 forms are sent.
- February 15, 2024 - Reclaim your exemption from withholding.
- March 15, 2024 - Partnerships and S-Corporations due to file or extend.
- April 15, 2024 - Individual tax day (unless extended due to local state holiday), Deadline to File Form 4868 to request an extension and pay expected tax due, First quarter 2024 estimated tax payment due.



Dave Morgan
firm partner

We are excited about this new year. This coming tax season we have been restructuring and planning for it and look forward to providing our best for our clients.



Dave's fur baby, Daisy, was in the new years spirit!



It takes a village



Sean Jeong
tax accountant



Calistus Alexander
tax accountant

New Faces!

This past year we've seen some growth in our team. We've added these two new peeps to the family.

"You're only as good as your team"
Teamwork really does make the dreamwork here



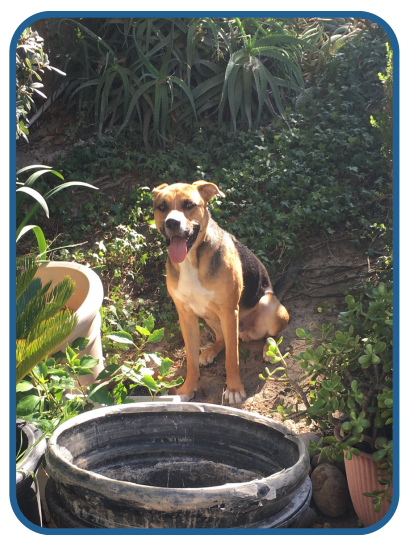
Employee Highlight



Danny Ruskowski
tax senior

Danny has been such a great asset to our CTA team! We have had him for just over a year now and he is incredibly hardworking and charismatic. He brings smiles to our faces with intellectual banter and jokes. A great employee we are lucky to have.

CTA Pet Highlight



A special shoutout goes to Danny's furry best friend Baxter. Baxter, we thank you for your sacrifice of letting your human come to work for us.

