



The JPT Financial Newswire

A periodic newsletter from JPT Financial Solutions, Inc.

May 29, 2024



JPT FINANCIAL SOLUTIONS, INC.

Eldercare • Advisory • Tax • Accounting

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● RETIREMENT TOPICS - BENEFICIARY

<https://www.irs.gov/retirement-plans/plan-participant-employee/retirement-topics-beneficiary#:~:text=Beneficiaries%20of%20retirement%20plan%20and,an%20IRA%20after%20they%20die.>

● WHERE TO SEARCH FOR A MISSING WILL

https://www.lexology.com/library/detail.aspx?g=15d67271-05d9-4d76-a6cd-dd2d8ec43fae&utm_source=lexology+daily+newsfeed&utm_medium=html+email+-+body+-+general+section&utm_campaign=lexology+subscriber+daily+feed&utm_content=lexology+daily+newsfeed+2023-12-05&utm_term=

● US TAX COURT DECISION OPENS LIMITED PARTNERS TO SELF-EMPLOYMENT TAX EXPOSURE

https://www.lexology.com/library/detail.aspx?g=a5a69457-ebeb-47bb-a66a-126e88305212&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-12-06&utm_term=

● DID YOU KNOW A LIMITED PARTNER MAY BE SUBJECT TO SELF-EMPLOYMENT TAX ON THEIR SHARE OF PARTNERSHIP INCOME IF THEY ACTIVELY PARTICIPATE IN THE BUSINESS?

https://www.lexology.com/library/detail.aspx?g=05393c37-1652-4ff7-9caa-2fef78e22985&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-12-07&utm_term=

● **NEW FEDERAL EXEMPTION AMOUNTS FOR 2024 WILL IMPACT ESTATE AND GIFT TAX PLANNING**

https://www.lexology.com/library/detail.aspx?g=6b96d6b0-d815-4528-abe5-f18ca48ebe98&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-12-08&utm_term=

● **CHOOSING A REPUTABLE TAX PREPARER IS VITAL TO TAX SECURITY**

<https://www.irs.gov/newsroom/choosing-a-reputable-tax-preparer-is-vital-to-tax-security>

● **2024 TAX FILING SEASON TO OPEN JAN. 29**

<https://njcpa.org/article/2024/01/09/2024-tax-filing-season-to-open-jan.-29>

● **TIPS FOR A BETTER TAX SEASON**

<https://www.journalofaccountancy.com/issues/2024/jan/tips-for-a-better-tax-season.html>

● **AVOID LEAVING AN INHERITANCE TO SOMEONE YOU'VE NEVER MET**

https://www.lexology.com/library/detail.aspx?g=3258e33b-7b3d-4d05-9c6a-5be8082ac861&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-12-15&utm_term=

● **IRS EXPANDS BUSINESS TAX ACCOUNT ACCESS TO S CORPORATIONS, PARTNERSHIPS; ADDS ABILITY TO VIEW BUSINESS TAX TRANSCRIPTS**

<https://www.irs.gov/newsroom/transformation-work-continues-irs-expands-business-tax-account-access-to-s-corporations-partnerships-adds-ability-to-view-business-tax-transcripts>

● **20 EMAIL MARKETING TIPS FOR SMALL BUSINESS OWNERS**

<https://succeedasyourownboss.com/20-email-marketing-tips-for-small-business-owners/>

● **OVERVIEW OF THE CORPORATE TRANSPARENCY ACT OF 2024**

https://www.lexology.com/library/detail.aspx?g=f5570204-867d-44d1-bc32-61df2893e899&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-12-21&utm_term=

● **DON'T CONFUSE FORMING YOUR NJ BUSINESS WITH REGISTERING FOR TAXES**

When you form your business with the State, you may still need to register for taxes. Income tax, sales & use tax & the various reporting requirements are important to understand.

https://business.nj.gov/pages/register-for-taxes?utm_campaign=20231221digest&utm_medium=email&utm_source=govdelivery

● **JAN. 31 FILING DEADLINE FOR EMPLOYERS TO FILE WAGE STATEMENTS, INDEPENDENT CONTRACTOR FORMS**

<https://www.irs.gov/newsroom/irs-reminder-jan-31-filing-deadline-for-employers-to-file-wage-statements-independent-contractor-forms>

● **IRS, SECURITY SUMMIT PARTNERS WARN OF SURGE IN “NEW CLIENT” SCAMS AIMED AT TAX PROS AS 2024 FILING SEASON APPROACHES**

<https://www.irs.gov/newsroom/irs-security-summit-partners-warn-of-surge-in-new-client-scams-aimed-at-tax-pros-as-2024-filing-season-approaches>

● **SAFEGUARDING YOUR LEGACY WITH A LIVING TRUST**

<https://www.visionretirement.com/articles/livingtrusts>

● **SMALL BUSINESS ALERT: NEW FEDERAL REPORTING REQUIRED - ESPECIALLY IMPORTANT FOR NEW BUSINESS STARTUPS**

<https://tips.resourcesforclients.com/abrKr5QpDa76/6260>

● **BIGGEST EXPENSES FOR RETIREES—AND HOW TO MINIMIZE THEM!**

<https://www.visionretirement.com/articles/biggestretirementexpenses2024>

● **TAX SEASON STARTS SOON. HERE ARE 3 BIG CHANGES**

<https://advisorstream.com/read/tax-season-starts-soon-here-are-3-big-changes/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2k1jo1OTExNSwicHJldmllldyI6ZmFsc2UsImNvbW1faWQiOiJkxODk3NjlsImRlc3RfaWQiOiJQ5NTgwMzYsInJlYWRlcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.IfQJgV3Jor56tfuKbM4QGq1bTn8XS9KsTVfYKcl12rs>

● **LUGGING CREDIT CARD DEBT INTO 2024? NOW'S THE TIME TO MAKE A PLAN**

<https://advisorstream.com/read/lugging-credit-card-debt-into-2024-nows-the-time-to-make-a-plan/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2k1jo1OTExNSwicHJldmllldyI6ZmFsc2UsImNvbW1faWQiOiJkxODk3NjlsImRlc3RfaWQiOiJQ5NTgwMzYsInJlYWRlcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.IfQJgV3Jor56tfuKbM4QGq1bTn8XS9KsTVfYKcl12rs>

● **COVERDELL ESA VS. 529 PLANS**

<https://www.visionretirement.com/articles/coverdell-vs-529>

● **IRS IDENTITY THEFT SEASON BEGINS NOW**

<https://tips.resourcesforclients.com/abrKr5QpDa76/6261>

● **SMALL BUSINESS ALERT: NEW FEDERAL REPORTING REQUIRED**

<https://tips.resourcesforclients.com/abrKr5QpDa76/6260>

● **HOW WORKING DURING RETIREMENT IMPACTS YOUR SOCIAL SECURITY BENEFITS**

<https://www.visionretirement.com/articles/workingandsocialsecurity>

● **EXCEPTIONS TO TAX ON EARLY DISTRIBUTIONS**

Individuals must pay an additional 10% early withdrawal tax from an IRA or retirement plan before reaching age 59½ unless an exception applies.

<https://www.irs.gov/retirement-plans/plan-participant-employee/retirement-topics-exceptions-to-tax-on-early-distributions#:~:text=Generally%2C%20the%20amounts%20an%20individual,tax%20unless%20an%20exception%20a pplies.>

● **HOW TO RECOGNIZE AND PREVENT FIVE COMMON FORMS OF OCCUPATIONAL FRAUD**

https://www.cpapracticeadvisor.com/2023/12/22/how-to-recognize-and-prevent-five-common-forms-of-occupational-fraud/99461/?utm_source=CPA+Practice+Advisor&utm_campaign=1a2ac5da66-EMAIL_CAMPAIGN_2023_12_27_06_05&utm_medium=email&utm_term=0_-1a2ac5da66-%5BLIST_EMAIL_ID%5D

● **PENNSYLVANIA WILL RECOGNIZE GRANTOR TRUSTS FOR TAX YEARS BEGINNING AFTER JANUARY 1, 2025**

https://www.withum.com/resources/pennsylvania-will-recognize-grantor-trusts-for-tax-years-beginning-after-january-1-2025/?utm_source=marketo&utm_medium=email&utm_campaign=private%20client&utm_content=article&mkt_tok=NDq5LU5XVC0xNDYAAAGQb5kMczHMUbKIh3kTRwWYpximN8q86hHlkUpUsvd6Dqi0d7LsbuIT-zvRMSQiLkJQL66kfCCbMDigyieDQS115_KfVsASKvKOiK8tyYhb

● **SIX REASONS TO CLAIM SOCIAL SECURITY BENEFITS EARLY**

<https://www.visionretirement.com/articles/claimsocialsecurityearly>

● **NEW JERSEY TAX GUIDE BUYING OR SELLING A HOME IN NEW JERSEY**

<https://www.nj.gov/treasury/taxation/documents/pdf/guides/Buying-or-Selling-a-Home-in-New-Jersey.pdf>

● **SHOULD I PAY POINTS AND BUY DOWN MY MORTGAGE?**

<https://www.visionretirement.com/articles/should-i-pay-points>

● **2024 STATE-BY-STATE LIST OF SALES TAX HOLIDAYS**

https://www.cpapracticeadvisor.com/2024/01/03/2024-state-by-state-list-of-sales-tax-holidays/99660/?utm_source=CPA+Practice+Advisor&utm_campaign=ce3676ff90-EMAIL_CAMPAIGN_2024_01_02_09_26&utm_medium=email&utm_term=0_-ce3676ff90-%5BLIST_EMAIL_ID%5D

● **YOUR EMPLOYEE HAS DEMENTIA: WHAT TO DO?**

https://www.lexology.com/library/detail.aspx?g=3feb53d9-34ff-4e80-b7bc-6e264c15825c&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2024-01-09&utm_term=

● **US DEPARTMENT OF LABOR PUBLISHES FINAL RULE ON DETERMINING INDEPENDENT CONTRACTOR STATUS**

<https://www.bipc.com/us-department-of-labor-publishes-final-rule-on-determining-independent-contractor-status>

● **457 PLAN CONTRIBUTION LIMIT FOR 2024 RISES TO \$20,500**

https://www.cpapracticeadvisor.com/2024/01/11/457-plan-contribution-limit-for-2024-rises-to-20500/99970/?utm_source=CPA+Practice+Advisor&utm_campaign=b8b01b96bc-EMAIL_CAMPAIGN_2024_01_11_07_20&utm_medium=email&utm_term=0_-b8b01b96bc-%5BLIST_EMAIL_ID%5D

● **READ THIS BEFORE PREPAYING FOR YOUR FUNERAL EXPENSES**

<https://www.visionretirement.com/articles/prepayfuneralexpenses>

● **IRS WARNS TAX PROFESSIONALS TO BE AWARE OF EFIN SCAM EMAIL**

<https://www.irs.gov/newsroom/irs-warns-tax-professionals-to-be-aware-of-efin-scam-email-special-webinars-offered-next-week>

● **ESTATE PLANNING: THE BASICS OF A SPECIAL NEEDS TRUST**

https://www.cpapracticeadvisor.com/2024/01/12/estate-planning-the-basics-of-a-special-needs-trust/100030/?utm_source=CPA+Practice+Advisor&utm_campaign=932b6fd5b6-EMAIL_CAMPAIGN_2024_01_12_07_17&utm_medium=email&utm_term=0_-932b6fd5b6-%5BLIST_EMAIL_ID%5D

● **TAX TIPS FOR ACCOUNTANTS WITH GAMBLING CLIENTS**

https://www.cpapracticeadvisor.com/2024/01/10/tax-tips-for-accountants-with-gambling-clients/99880/?utm_source=CPA+Practice+Advisor&utm_campaign=932b6fd5b6-EMAIL_CAMPAIGN_2024_01_12_07_17&utm_medium=email&utm_term=0_-932b6fd5b6-%5BLIST_EMAIL_ID%5D

● **EMPLOYEE OR INDEPENDENT CONTRACTOR? SIX FACTORS TO CONSIDER UNDER NEW DOL RULE**

https://www.lexology.com/library/detail.aspx?g=d36d8ea1-567b-442b-8283-ac2f8fab69cd&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2024-01-16&utm_term=

● **THE TAXPAYER BILL OF RIGHTS PROTECTS ALL TAXPAYERS YEAR-ROUND**

<https://www.irs.gov/newsroom/the-taxpayer-bill-of-rights-protects-all-taxpayers-year-round>

● **10 BIBLE VERSES EVERY SMALL BUSINESS OWNER NEEDS FOR 2024**

https://succeedasyourownboss.com/10-bible-verses-every-small-business-owner-needs-for-2024/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone

● **EMPLOYEE RETENTION CREDIT – VOLUNTARY DISCLOSURE PROGRAM**

If you claimed & received the ERC, but you are ineligible & need to repay it, this page will help you figure out if you can apply for the ERC Voluntary Disclosure Program & how to do that.

<https://www.irs.gov/coronavirus/employee-retention-credit-voluntary-disclosure-program>

● **NJCPA SEEKS BOI GUIDANCE**

<https://www.njcpa.org/article/2024/02/15/njcpa-seeks-boi-guidance>

● **IRS SHARES 7 WARNING SIGNS EMPLOYEE RETENTION CREDIT CLAIMS MAY BE INCORRECT**

<https://www.irs.gov/newsroom/irs-shares-7-warning-signs-employee-retention-credit-claims-may-be-incorrect-urges-businesses-to-revisit-eligibility-resolve-issues-now-before-march-22>

● **2023 SENIOR FREEZE PROPERTY TAX REIMBURSEMENT APPLICATIONS ARE IN THE MAIL**

<https://njcpa.org/article/2024/02/13/2023-senior-freeze-property-tax-reimbursement-applications-are-in-the-mail>

● **HOW CPAS CAN HELP BUSINESSES RECOUP WORKERS' COMP COSTS**

<https://njcpa.org/stayinformed/news/blog/post/njcpa-focus/2024/02/14/how-cpas-can-help-businesses-recoup-workers--comp-costs>

● **6 SIMPLE STRATEGIES FOR GETTING TOP DOLLAR WHEN SELLING YOUR HOME**

<https://www.christianmoneysolutions.com/blog/6-simple-strategies-for-getting-top-dollar-when-selling-your-home>

● **WHEN ONE OF YOUR EMPLOYEES FAILS TO REPORT TO WORK...**

https://www.lexology.com/library/detail.aspx?g=8bb8f726-b33b-4397-880a-783a2edc43b1&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+++Body++General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2024-01-23&utm_term=

● **3 THINGS TO KNOW ABOUT MEDICARE IN 2024**

<https://www.fool.com/retirement/2024/01/09/3-things-to-know-about-medicare-in-2024/?source=iedfolrf0000001>

● **IRS IDENTITY THEFT SEASON BEGINS NOW**

https://rrbb.com/irs-identity-theft-season-begins/?utm_content=280643659&utm_medium=social&utm_source=linkedin&hss_channel=lcp-1542838

● **IS A SERVICE ANIMAL TAX DEDUCTIBLE?**

<https://www.ameridisability.com/is-a-service-animal-tax-deductible/>

● **DEADLINE TO UPGRADE TO THE NY ENHANCED STAR PROPERTY TAX EXEMPTION IS MARCH 1**

<https://content.govdelivery.com/accounts/NYTAX/bulletins/38cb793>

● **WHY YOU SHOULD BE DOING CASH FLOW ANALYSIS**

https://www.sage.com/en-us/blog/why-you-should-be-doing-cash-flow-analysis/?utm_campaign=NPS_24Q2_NCA_US_SageAdviceUSFebruary_Email01Small3x&utm_medium=email&utm_source=Eloqua

● **DON'T LET RETIREMENT TAX BENEFITS PASS BY YOUR BUSINESS CLIENTS**

https://www.cpapracticeadvisor.com/2024/01/24/dont-let-tax-benefits-pass-by-your-business-clients/100600/?utm_source=CPA+Practice+Advisor&utm_campaign=f540360d67-EMAIL_CAMPAIGN_2024_01_25_06_49&utm_medium=email&utm_term=0_f540360d67-%5BLIST_EMAIL_ID%5D

● **3 WAYS TO REDUCE TAXES ON INVESTMENT EARNINGS**

https://www.cpapracticeadvisor.com/2024/01/29/3-ways-to-reduce-taxes-on-investment-earnings/100681/?utm_source=CPA+Practice+Advisor&utm_campaign=4dcdfc6e84-EMAIL_CAMPAIGN_2024_01_29_06_33&utm_medium=email&utm_term=0_4dcdfc6e84-%5BLIST_EMAIL_ID%5D

● **CONSIDERING A REVERSE MORTGAGE? READ THIS FIRST.**

<https://www.visionretirement.com/articles/reversemortgages101>

● **INTEREST RATE VS. APR: HOW TO COMPARE MORTGAGES**

<https://www.visionretirement.com/articles/mortgageratevsapr>

● **NYS TAX DEPARTMENT: ANNUAL SALES TAX FILERS—FILE AN ANNUAL RETURN BY MARCH 20, 2024**

<https://content.govdelivery.com/accounts/NYTAX/bulletins/37a1979>

● **IRS LAUNCHES NEW EFFORT AIMED AT HIGH-INCOME NON-FILERS**

<https://www.irs.gov/newsroom/irs-launches-new-effort-aimed-at-high-income-non-filers-125000-cases-focused-on-high-earners-including-millionaires-who-failed-to-file-tax-returns-with-financial-activity-topping-100-billion>

● **IRS: NEVER MIND THE MYTHS; KNOW THE FACTS ABOUT RECEIVING A FORM 1099-K IN 2024**

<https://www.irs.gov/newsroom/irs-never-mind-the-myths-know-the-facts-about-receiving-a-form-1099-k-in-2024>

● **PREPARING FOR AN ERC AUDIT? SIX KEY QUESTIONS THE IRS WILL ASK**

<https://njcpa.org/stayinformed/news/blog/post/njcpa-focus/2024/02/26/preparing-for-an-erc-audit--six-key-questions-the-irs-will-ask>

● **IRS: TAKE CARE WHEN CHOOSING A TAX RETURN PROFESSIONAL**

<https://www.irs.gov/newsroom/irs-take-care-when-choosing-a-tax-return-professional>

● **3/15 DEADLINE PARTNERSHIPS & S CORPS**

Fri 3/15/24 is the deadline for filing calendar-yr partnership & S Corp returns. Both can apply for a 6 month extension. Payment must accompany the return or extension if taxes are due. Extension of time 2file does not extend the time 2pay.

● **MASTERING RMDs: NAVIGATING REQUIRED MINIMUM DISTRIBUTION ESSENTIALS**

<https://www.visionretirement.com/articles/rmd-essentials>

● **REPORTING MEDICARE FRAUD & ABUSE**

https://www.medicare.gov/basics/reporting-medicare-fraud-and-abuse?utm_campaign=20240307_gmd_frd_gal&utm_content=english&utm_medium=email&utm_source=govdelivery

● **HERE'S WHO NEEDS TO FILE A TAX RETURN IN 2024**

<https://www.irs.gov/newsroom/heres-who-needs-to-file-a-tax-return-in-2024>

● **FIVE TAX BREAKS OFTEN OVERLOOKED BY SMALL BUSINESS OWNERS**

https://www.cpapracticeadvisor.com/2024/01/31/five-tax-breaks-overlooked-by-business-owners/100790/?utm_source=CPA+Practice+Advisor&utm_campaign=7ac7b9e5fc-EMAIL_CAMPAIGN_2024_02_02_12_08&utm_medium=email&utm_term=0_-7ac7b9e5fc-%5BLIST_EMAIL_ID%5D

● **10 TAX FORMS RETIREES RECEIVE—AND WHAT THEY MEAN**

https://www.cpapracticeadvisor.com/2024/02/06/10-tax-forms-retirees-receive-and-what-they-mean/101288/?utm_source=CPA+Practice+Advisor&utm_campaign=93eecfd72f-EMAIL_CAMPAIGN_2024_02_08_08_24&utm_medium=email&utm_term=0_-93eecfd72f-%5BLIST_EMAIL_ID%5D

● **HOW TO MANAGE TAX EXEMPT SALES MORE EFFECTIVELY**

https://www.cpapracticeadvisor.com/2024/02/06/how-to-manage-tax-exempt-sales-more-effectively/101511/?utm_source=CPA+Practice+Advisor&utm_campaign=f4f48af16a-EMAIL_CAMPAIGN_2024_02_09_12_51&utm_medium=email&utm_term=0_-f4f48af16a-%5BLIST_EMAIL_ID%5D

● **MORE AMERICANS ARE TREATING THEIR 401(K)S LIKE CASH MACHINES**

https://advisorstream.com/read/more-americans-are-treating-their-401ks-like-cash-machines/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2lkljo1OTExNSwicHJldmllldyI6ZmFsc2UsImNvbW1faWQiOiJk1NTc4MDcsImRlc3RfaWQiOiJQ5NTgwMzYsInJlYWRlcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.i2hCaOI-KH-jCJ_PVp1sVloLYgfy8AUhbhEIGbzCmVc

● **SPRING CLEANING YOUR FINANCES: A 10 POINT CHECKLIST**

https://advisorstream.com/read/forbes/money/spring-cleaning-your-finances-a-10-point-checklist/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2lkljo1OTExNSwicHJldmllldyI6ZmFsc2UsImNvbW1faWQiOiJk1NTc4MDcsImRlc3RfaWQiOiJQ5NTgwMzYsInJlYWRlcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.i2hCaOI-KH-jCJ_PVp1sVloLYgfy8AUhbhEIGbzCmVc

● **7 WAYS TO PREPARE FOR DOL'S OVERTIME RULE THAT COULD REQUIRE YOU TO PAY YOUR EMPLOYEES A LOT MORE**

<https://njcpa.org/stayinformed/news/blog/post/njcpa-focus/2024/03/12/7-ways-to-prepare-for-dol-s-overtime-rule-that-could-require-you-to-pay-your-employees-a-lot-more>

● **RETURN-TO-OFFICE MANDATES: CONSIDERATIONS FOR EMPLOYERS**

<https://www.fm-magazine.com/news/2024/mar/return-to-office-mandates-considerations-for-employers.html>

● **UNWANTED INVENTORY – IS IT BETTER IN THE LANDFILL OR AS A CHARITABLE DONATION?**

https://www.cpapracticeadvisor.com/2024/02/13/unwanted-inventory-is-it-better-in-the-landfill-or-philanthropy/101603/?utm_source=CPA+Practice+Advisor&utm_campaign=1a11e8aca8-EMAIL_CAMPAIGN_2024_02_14_07_07&utm_medium=email&utm_term=0_-1a11e8aca8-%5BLIST_EMAIL_ID%5D

● **HOW TO REPORT QCDS ON A TAX RETURN**

https://www.cpapracticeadvisor.com/2024/02/19/how-to-report-qcds-on-your-tax-return/101811/?utm_source=CPA+Practice+Advisor&utm_campaign=022890b99a-EMAIL_CAMPAIGN_2024_02_23_08_27&utm_medium=email&utm_term=0_-022890b99a-%5BLIST_EMAIL_ID%5D

● **11 REASONS TO CONSIDER A 1031 EXCHANGE**

https://www.cpapracticeadvisor.com/2024/02/22/11-reasons-to-consider-a-1031-exchange/101903/?utm_source=CPA+Practice+Advisor&utm_campaign=36c11cd40e-EMAIL_CAMPAIGN_2024_02_26_07_06&utm_medium=email&utm_term=0_-36c11cd40e-%5BLIST_EMAIL_ID%5D

● **BACKDOOR ROTH IRAS: ARE THEY RIGHT FOR YOU?**

<https://www.visionretirement.com/articles/backdoorira>

● **HOW SOCIAL SECURITY SPOUSAL BENEFITS WORK**

<https://www.visionretirement.com/articles/social-security-spousal-benefits>

● **WHY ALL SUCCESSFUL SMALL BUSINESS OWNERS HAVE A COACH**

https://succeedasyourownboss.com/why-all-successful-small-business-owners-have-a-coach/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone

● **HOW TO THRIVE AS A SMALL BUSINESS FOR 25+ YEARS**

https://succeedasyourownboss.com/how-to-thrive-as-a-small-business-for-25-years/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone

● **IRS OFFERS MYTH BUSTERS ABOUT FORM 1099-K**

https://www.cpapracticeadvisor.com/2024/03/01/irs-offers-myth-busters-about-form-1099-k/102190/?utm_source=CPA+Practice+Advisor&utm_campaign=7dd277b4cd-EMAIL_CAMPAIGN_2024_03_01_04_43&utm_medium=email&utm_term=0_-7dd277b4cd-%5BLIST_EMAIL_ID%5D

● **IRS MAKES ENHANCEMENTS TO ‘WHERE’S MY REFUND’ TOOL, SO TAXPAYERS CAN TRACK REFUND DATE AND STATUS**

https://www.cpapracticeadvisor.com/2024/02/29/irs-makes-enhancements-to-wheres-my-refund-tool/102141/?utm_source=CPA+Practice+Advisor&utm_campaign=7dd277b4cd-EMAIL_CAMPAIGN_2024_03_01_04_43&utm_medium=email&utm_term=0_-7dd277b4cd-%5BLIST_EMAIL_ID%5D

● **12 TIPS FOR SELF-EMPLOYED TAXPAYERS**

https://www.cpapracticeadvisor.com/2024/02/27/12-tips-for-self-employed-taxpayers/102009/?utm_source=CPA+Practice+Advisor&utm_campaign=7dd277b4cd-EMAIL_CAMPAIGN_2024_03_01_04_43&utm_medium=email&utm_term=0_-7dd277b4cd-%5BLIST_EMAIL_ID%5D

● **PROTECT YOURSELF FROM SCAMS**

<https://www.capitalone.com/digital/scam-education/>

● **SUCCESSION PLANNING: THE POSITIVES AND NEGATIVES OF MERGERS & ACQUISITIONS**

<https://njcpa.org/article/2024/03/12/succession-planning--the-positives-and-negatives-of-mergers---acquisitions>

● **STATE OF NEW JERSEY UPDATE: HAVE YOU FILED YOUR ANNUAL REPORT?**

https://business.nj.gov/pages/filings-and-accounting?utm_campaign=20240315digest&utm_medium=email&utm_source=govdelivery

● **WHAT DOES IT TAKE TO GET THAT PROMOTION?**

<https://njcpa.org/article/2024/03/27/what-does-it-take-to-get-that-promotion>

● **5 TIPS FOR EFFECTIVELY MANAGING STAFF**

<https://njcpa.org/stayinformed/news/blog/post/njcpa-focus/2024/03/27/5-tips-for-effectively-managing-staff>

● **9 KEY QUESTIONS TO ASK A FINANCIAL ADVISOR**

<https://www.christianmoneysolutions.com/blog/9-questions-to-ask-a-financial-advisor>

● **TAXPAYERS SHOULD REPORT DIGITAL ASSET TRANSACTIONS, GIG ECONOMY INCOME, FOREIGN SOURCE INCOME AND ASSETS**

<https://www.irs.gov/newsroom/tax-time-guide-taxpayers-should-report-digital-asset-transactions-gig-economy-income-foreign-source-income-and-assets>

● **LOOKING TO SELF-FUND YOUR LONG-TERM CARE? READ THIS!**

<https://www.visionretirement.com/articles/self-funding-long-term-care>

● **UNDERSTANDING & AVOIDING MEDICARE SURCHARGES**

<https://www.visionretirement.com/articles/irmaa-medicare-surcharges>

● **SIX TYPES OF INSURANCE EVERYONE NEEDS**

<https://www.visionretirement.com/articles/six-types-of-insurance-everyone-needs>

● **WHY PLANNING FOR YOUR RETIREMENT IS MORE COMPLICATED TODAY**

<https://www.visionretirement.com/articles/why-saving-for-retirement-isnt-easy>

● **BEWARE OF COMPANIES MISREPRESENTING NUTRITION, WELLNESS AND GENERAL HEALTH EXPENSES AS MEDICAL CARE FOR FSAS, HSAS, HRAS AND MSAS**

<https://www.irs.gov/newsroom/irs-alert-beware-of-companies-misrepresenting-nutrition-wellness-and-general-health-expenses-as-medical-care-for-fsas-hsas-hras-and-msas>

● **HOW TO FIND THE PERFECT BUSINESS IDEA**

https://succeedasyourownboss.com/how-to-find-the-perfect-business-idea/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone

● **ARE YOU KEEPING YOUR BUSINESS COMMITMENTS TO YOURSELF?**

https://succeedasyourownboss.com/are-you-keeping-your-business-commitments-to-yourself/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone

● **DOES YOUR FIRM HAVE TRUST ISSUES WITH ITS DATA?**

https://www.cpapracticeadvisor.com/2024/03/27/does-your-firm-have-trust-issues-with-its-data/103186/?utm_source=CPA+Practice+Advisor&utm_campaign=d6915581f9-EMAIL_CAMPAIGN_2024_03_22_10_00&utm_medium=email&utm_term=0_-d6915581f9-%5BLIST_EMAIL_ID%5D

● **HOW TO KEEP CLIENTS PROTECTED FROM SCAMMERS DURING AND AFTER TAX SEASON**

https://www.cpapracticeadvisor.com/2024/04/08/how-to-keep-clients-protected-from-scammers-during-and-after-tax-season/103666/?utm_source=CPA+Practice+Advisor&utm_campaign=81ca370620-EMAIL_CAMPAIGN_2024_04_08_04_42&utm_medium=email&utm_term=0_-81ca370620-%5BLIST_EMAIL_ID%5D

● **FOUR WAYS TO GIVE MONEY TAX-FREE TO YOUR CHILDREN**

https://www.cpapracticeadvisor.com/2024/04/01/four-ways-to-give-money-tax-free-to-your-children-when-you-die/103350/?utm_source=CPA+Practice+Advisor&utm_campaign=81ca370620-EMAIL_CAMPAIGN_2024_04_08_04_42&utm_medium=email&utm_term=0_-81ca370620-%5BLIST_EMAIL_ID%5D

● **ASSET ALLOCATION: A COMPREHENSIVE EXPLORATION**

<https://www.visionretirement.com/articles/asset-allocation>

● **RETIREES ARE FACING SIZABLE TAX BILLS DUE TO FRAUD**

https://www.cpapracticeadvisor.com/2024/04/16/retirees-are-facing-significant-tax-bills-due-to-fraud/104057/?utm_source=CPA+Practice+Advisor&utm_campaign=2860ce7758-EMAIL_CAMPAIGN_2024_04_19_06_50&utm_medium=email&utm_term=0_-2860ce7758-%5BLIST_EMAIL_ID%5D

● **4 KEY CRYPTO TAX TIPS FOR ENTREPRENEURS AND DIGITAL INVESTORS**

https://www.cpapracticeadvisor.com/2024/04/16/4-key-crypto-tax-tips-for-entrepreneurs-and-digital-investors/103920/?utm_source=CPA+Practice+Advisor&utm_campaign=2860ce7758-EMAIL_CAMPAIGN_2024_04_19_06_50&utm_medium=email&utm_term=0_-2860ce7758-%5BLIST_EMAIL_ID%5D

● **NJ BUSINESS ACTION CENTER (NJBAC) SMALL BUSINESS MANUAL OFFERS A WEALTH OF INFORMATION ON PLANNING, LAUNCHING, OPERATING & GROWING YOUR NJ BUSINESS**

https://www.nj.gov/state/bac/assets/downloads/NJ_Small_Business_Manual_for_download.pdf

● **5 TIPS TO ACHIEVE YOUR BUSINESS GOALS**

https://www.sage.com/en-us/blog/tips-to-achieve-your-business-goals/?utm_campaign=NPS_24Q3_NCA_US_SageAdviceApril_Email01Small3x&utm_medium=email&utm_source=Eloqua

● **IF TAXPAYERS MISSED THE DEADLINE TO FILE A FEDERAL TAX RETURN, THE IRS CAN HELP**

<https://www.irs.gov/newsroom/if-taxpayers-missed-the-deadline-to-file-a-federal-tax-return-the-irs-can-help>

● **WHEN A TAXPAYER SHOULD FILE AN AMENDED FEDERAL TAX RETURN**

<https://www.irs.gov/newsroom/when-a-taxpayer-should-file-an-amended-federal-tax-return>

● **USING THE RULE OF 55 TO TAKE EARLY 401(K) WITHDRAWS**

<https://www.visionretirement.com/articles/rule-of-55>

● **MEDICARE 101: THE BASICS**

<https://www.visionretirement.com/articles/medicare-101>

● **DID YOU RECEIVE A LETTER FROM THE NEW YORK TAX DEPARTMENT? DON'T IGNORE IT.**

<https://content.govdelivery.com/accounts/NYTAX/bulletins/399e664>

● **TIME RUNNING OUT TO CLAIM \$1 BILLION IN REFUNDS FOR TAX YEAR 2020, TAXPAYERS FACE MAY 17 DEADLINE**

<https://www.irs.gov/newsroom/time-running-out-to-claim-1-billion-in-refunds-for-tax-year-2020-taxpayers-face-may-17-deadline>

● **SECURE 2.0 ACT CHANGES AFFECT HOW BUSINESSES COMPLETE FORMS W-2**

<https://njcpa.org/article/2024/05/02/secure-2.0-act-changes-affect-how-businesses-complete-forms-w-2>

● **WHAT PEOPLE NEED TO KNOW WHEN STARTING A BUSINESS**

<https://www.irs.gov/newsroom/what-people-need-to-know-when-starting-a-business>

● **EMERGENCY PREPAREDNESS PLANS FOR BUSINESSES SHOULD INCLUDE FINANCIAL RECORDS**

<https://www.irs.gov/newsroom/emergency-preparedness-plans-for-businesses-should-include-financial-records>

● **WHAT IS MEDICARE ADVANTAGE AND HOW DOES IT WORK?**

<https://www.visionretirement.com/articles/what-is-medicare-advantage-and-how-it-works>

● **NJ UPDATES SALES & USE TAX EXEMPTION FOR CONTRACTOR PURCHASES**

<https://www.nj.gov/treasury/taxation/businesses/salestax/salesexemptioncontractor.shtml>

● **SMALL BUSINESSES SHOULD MAKE THE SMALL BUSINESS AND SELF-EMPLOYED TAX CENTER THEIR FIRST STOP FOR FINDING JUST ABOUT EVERYTHING THEY NEED TO MEET THEIR FEDERAL TAX OBLIGATIONS**

<https://www.irs.gov/businesses/small-businesses-self-employed>

● **IRS GUIDANCE ON CLOSING A BUSINESS**

<https://www.irs.gov/businesses/small-businesses-self-employed/closing-a-business>

● **WHAT TAXPAYERS SHOULD DO IF THEY RECEIVE MAIL FROM THE IRS**

<https://www.irs.gov/newsroom/what-taxpayers-should-do-if-they-receive-mail-from-the-irs>

● **CAN YOU TURN A SIDE HUSTLE INTO AN EMPIRE?**

https://succeedasyourownboss.com/can-you-turn-a-side-hustle-into-an-empire/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone

● **HOW CPAS ARE EVOLVING INTO STRATEGIC ADVISORS**

https://www.cpapracticeadvisor.com/2024/05/08/how-cpas-are-evolving-into-strategic-advisors/104967/?utm_source=CPA+Practice+Advisor&utm_campaign=ea76da70c0-EMAIL_CAMPAIGN_2024_05_08_06_22&utm_medium=email&utm_term=0_-ea76da70c0-%5BLIST_EMAIL_ID%5D

● **WHAT IS MEDIGAP AND HOW DOES IT WORK?**

<https://www.visionretirement.com/articles/what-is-medigap-and-how-it-works>

● **MEDICARE ADVANTAGE VS. MEDIGAP. WHICH IS RIGHT FOR ME?**

<https://www.visionretirement.com/articles/medicareadvantagevsmedigap>

● **AS A NEW JERSEY RESIDENT, YOU ARE ENTITLED TO ONE FREE COPY OF YOUR CREDIT REPORT FROM EACH OF THE THREE NATIONWIDE CREDIT REPORTING AGENCIES**

https://www.nj.gov/dobi/division_consumers/finance/creditreport.htm

● **PROTECTING AN ELDER PERSON'S ASSETS**

https://www.lexology.com/library/detail.aspx?g=00371022-4050-4ac6-8908-dbf8758c9400&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2024-05-16&utm_term=

● **THE ESSENTIAL INGREDIENTS OF BUSINESS SUCCESS**

https://succeedasyourownboss.com/the-essential-ingredients-of-business-success/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone

● **U.S. HOUSE AND SENATE INTRODUCE LEGISLATION TO REPEAL SMALL BUSINESS OWNERSHIP REGISTRY**

https://www.nfib.com/content/analysis/national/u-s-house-and-senate-introduce-legislation-to-repeal-small-business-ownership-registry/?utm_source=eNews-NJ&utm_medium=email&utm_campaign=eNews05162024&utm_content=httpwwwnfibcomushouseandsenateintroducelegislationtorepealsmallbusinessownershipregistry&mkt_tok=NDgzLVNZTS0wNDkAAAGTlc6D7TghFRRePPeyCFsPG3OPavUAbj8m5h1liC_6pbelUGH_SRJmwuAOP4vY-i3tNcVGzJ3KR98H6waRP54TO7wbWCnFivl0XZjSpb6WLvyVT

- **HOME IMPROVEMENTS COULD HELP TAXPAYERS QUALIFY FOR HOME ENERGY CREDITS**
<https://www.irs.gov/newsroom/irs-home-improvements-could-help-taxpayers-qualify-for-home-energy-credits>

 - **WHAT IS A TOTTEN TRUST?**
<https://smartasset.com/estate-planning/what-is-totten-trust>

 - **ALL ABOUT EMPLOYEE STOCK OPTIONS (ESOS)**
<https://www.visionretirement.com/articles/what-are-employee-stock-options-and-how-they-work>

 - **AN OVERVIEW OF THE MOST COMMON RETIREMENT PLANS**
<https://www.visionretirement.com/articles/top-retirement-plans>

 - **IRS WARNS ABOUT FALSE FUEL TAX CREDIT CLAIMS; TAXPAYERS SHOULD BE WARY OF SCAMMERS**
<https://www.irs.gov/newsroom/dirty-dozen-irs-warns-about-false-fuel-tax-credit-claims-taxpayers-should-be-wary-of-scammers-heightened-review>

 - **SEVEN WAYS TO PREPARE WHEN YOU'RE FORCED INTO RETIREMENT**
<https://www.visionretirement.com/articles/forced-into-early-retirement>

 - **11 REASONS WHY ALL LEADERS NEED A MENTOR**
<https://www.excel-communications.com/blog/11-reasons-why-all-leaders-need-a-mentor>

 - **PROS AND CONS OF HIRING FAMILY MEMBERS IN YOUR SMALL BUSINESS**
https://succeedasyourownboss.com/pros-and-cons-of-hiring-family-members-in-your-small-business/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone
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