



The JPT Financial Newswire

A periodic newsletter from JPT Financial Solutions, Inc.

September 14, 2023



JPT FINANCIAL SOLUTIONS, INC.

Eldercare • Advisory • Tax • Accounting

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● **THE ABCS OF WORKER (MIS-)CLASSIFICATION**

<https://www.cpajournal.com/2023/05/02/the-abcs-of-worker-mis-classification-2/>

● **6 CHARACTERISTICS TO LOOK FOR WHEN CHOOSING A POWER OF ATTORNEY**

<https://www.verywellhealth.com/characteristics-for-choosing-power-of-attorney-4134991>

● **LACK OF DOCUMENTATION ON SALES & USE TAX AUDITS**

https://www.lexology.com/library/detail.aspx?g=caf7de32-be6b-43c6-bfed-9ab5aa989252&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-04-11&utm_term=

● **NEW JERSEY WARN ACT AMENDMENTS EXPANDING COVERAGE AND INCREASING SEVERANCE AND NOTICE REQUIREMENTS NOW IN EFFECT**

https://www.lexology.com/library/detail.aspx?g=01d705a3-3816-4032-9205-d7861ead494d&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-04-24&utm_term=

● **WHEN AN IRS LETTER ARRIVES, TAXPAYERS DON'T NEED TO PANIC, BUT THEY DO NEED TO READ IT**

<https://www.irs.gov/newsroom/when-an-irs-letter-arrives-taxpayers-dont-need-to-panic-but-they-do-need-to-read-it>

● **FEDERAL AND STATE TAXATION OF LIFE SETTLEMENTS**

<https://www.cpapracticeadvisor.com/2023/04/26/federal-and-state-taxation-of-life-settlements/78887/>

● **NEW JERSEY'S TEMPORARY WORKERS' BILL OF RIGHTS IS FIRST IN THE NATION TO REQUIRE EQUAL PAY FOR TEMPORARY WORKERS**

https://www.lexology.com/library/detail.aspx?g=d1ff2920-ba4a-44a7-9f24-f12777cfb23d&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-04-25&utm_term=

● **TAXPAYERS AND TAX PROS SHOULD LEARN ABOUT THESE COMMON TAX SCAMS**

<https://www.irs.gov/newsroom/taxpayers-and-tax-pros-should-learn-about-these-common-tax-scams>

● **SEC. 529 PLANS GET UPDATES**

https://www.cpapracticeadvisor.com/2023/04/24/the-tax-blotter-april-2023-sec-529-plans-get-updates/78953/?utm_source=CPA+Practice+Advisor&utm_campaign=9a710ded8d-EMAIL_CAMPAIGN_2023_04_24_03_16&utm_medium=email&utm_term=0_-9a710ded8d-%5BLIST_EMAIL_ID%5D

● **IRS PARTNERSHIP AUDITS: 5 MUST-DOS IN 30 DAYS**

https://www.lexology.com/library/detail.aspx?g=943a285f-77ac-4e98-8445-207c1031ce97&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-04-26&utm_term=

● **UNSCRUPULOUS TAX PREPARERS MAY TEMPT TAXPAYERS INTO FRAUD**

<https://www.irs.gov/newsroom/unscrupulous-tax-preparers-may-tempt-taxpayers-into-fraud>

● **AN OFFER IN COMPROMISE CAN HELP CERTAIN TAXPAYERS RESOLVE TAX DEBT**

<https://www.irs.gov/newsroom/an-offer-in-compromise-can-help-certain-taxpayers-resolve-tax-debt>

● **A REFRESHER ON THE TYPES OF SMALL BUSINESS LEGAL STRUCTURES, AND THEIR BENEFITS**

https://www.cpapracticeadvisor.com/2023/04/24/a-refresher-on-the-types-of-small-business-legal-structures-and-their-benefits/78947/?utm_source=CPA+Practice+Advisor&utm_campaign=db6037a926-EMAIL_CAMPAIGN_2023_04_24_09_20&utm_medium=email&utm_term=0_-db6037a926-%5BLIST_EMAIL_ID%5D

● **REASONS TO SETTLE A TRUST**

https://www.lexology.com/library/detail.aspx?g=661d54b0-ea7f-4c2b-b709-44d7cc3caa6b&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-04-28&utm_term=

● **IRS TOOLS AND RESOURCES TO HELP SMALL BUSINESSES**

<https://www.irs.gov/newsroom/irs-tools-and-resources-to-help-small-businesses>

● **NEW BUSINESS REPORTING REQUIREMENT COMING SOON**

<https://njcpa.org/article/2023/05/16/new-beneficial-ownership-information-reporting-requirements-coming-soon>

● **WHAT IS A LIFE ESTATE?**

<https://moneytips.com/what-is-a-life-estate/#:~:text=The%20IRS%20treats%20life%20estate,unless%20they%20sell%20the%20property.>

● **WHAT IS STEP-UP IN BASIS?**

<https://www.forbes.com/advisor/investing/what-is-step-up-in-basis/>

● **SUMMER'S ALMOST HERE — WHAT CALIFORNIA EMPLOYERS SHOULD KNOW WHEN HIRING MINORS**

https://www.lexology.com/library/detail.aspx?g=81a6bfac-ef3a-4f18-8499-f0ea5c4dac32&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-05-01&utm_term=

● **SHOULD YOU GET A PRENUP?**

https://www.lexology.com/library/detail.aspx?g=7f2cb648-c78a-469d-a9cd-3a09708c1203&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-05-01&utm_term=

● **HOBBY OR BUSINESS: HERE'S WHAT TO KNOW ABOUT THAT SIDE HUSTLE**

<https://www.irs.gov/newsroom/hobby-or-business-heres-what-to-know-about-that-side-hustle>

● **THE WORK OPPORTUNITY TAX CREDIT HELPS BUSINESSES THAT HIRE FROM ELIGIBLE GROUPS**

<https://www.irs.gov/newsroom/the-work-opportunity-tax-credit-helps-businesses-that-hire-from-eligible-groups>

● **THE WAY TEENS OBTAIN WORKING PAPERS IN NEW JERSEY WILL BE CHANGING ON JUNE 1, 2023**

https://nj.gov/labor/youngworkers/find-a-job/working-papers/getstarted.shtml?utm_campaign=20230504digest&utm_medium=email&utm_source=govdelivery

● **FDIC CHANGES DEPOSIT INSURANCE RULES FOR TRUST ACCOUNTS**

https://www.lexology.com/library/detail.aspx?g=2647c6e6-19be-42a4-ab81-8ec1b27d8f3d&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-05-05&utm_term=

● **“NOT A GOOD FIT” MIGHT BE GROUNDS FOR TERMINATION - BUT YOU MUST BE ABLE TO BACK IT UP**

https://www.lexology.com/library/detail.aspx?g=15e987b5-f9d2-4f24-9fda-378cecd05392&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-05-05&utm_term=

● **DON'T FORGET TO PROVIDE ANOTHER WARN NOTICE IF THE EMPLOYEES' SEPARATION DATE IS DELAYED**

https://www.lexology.com/library/detail.aspx?g=0dae8447-4048-43bb-91f8-3b4059b6cbef&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-05-05&utm_term=

● **HEALTH CARE PROXIES - 5 BIGGEST MISTAKES**

<https://www.forbes.com/sites/martinshenkman/2023/03/21/health-care-proxies5-biggest-mistakes/?sh=25d6a3d970e7>

● **NEW YORK MINIMUM WAGE TO INCREASE STARTING IN 2024**

https://www.cpapracticeadvisor.com/2023/05/04/new-york-minimum-wage-to-increase-starting-in-2024/79342/?utm_source=CPA+Practice+Advisor&utm_campaign=0f9849655d-EMAIL_CAMPAIGN_2023_05_04_03_44&utm_medium=email&utm_term=0_-0f9849655d-%5BLIST_EMAIL_ID%5D

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

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

● **AFTER A DISASTER, HERE'S WHERE TAXPAYERS CAN FIND IRS INFORMATION FAST**

<https://www.irs.gov/newsroom/after-a-disaster-heres-where-taxpayers-can-find-irs-information-fast>

● **PICKING THE RIGHT THIRD-PARTY PAYROLL SERVICE PROVIDER HELPS PROTECT BUSINESSES**

<https://www.irs.gov/newsroom/picking-the-right-third-party-payroll-service-provider-helps-protect-businesses>

● **TAX BENEFITS TO HELP OFFSET THE COST OF MAKING BUSINESSES ACCESSIBLE TO PEOPLE WITH DISABILITIES**

<https://www.irs.gov/newsroom/tax-benefits-to-help-offset-the-cost-of-making-businesses-accessible-to-people-with-disabilities>

● **FBAR - U.S. SUPREME COURT PROVIDES CLARITY ON PENALTIES**

https://www.lexology.com/library/detail.aspx?g=ca8d9ef8-861a-40b7-810e-65d022301df1&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-05-12&utm_term=

● **SHOULD YOU PRE-PAY FOR YOUR OWN FUNERAL AS PART OF ESTATE PLANNING?**

https://www.yahoo.com/lifestyle/pre-pay-own-funeral-part-222424756.html?guccounter=1&guce_referrer=aHR0cHM6Ly9lY2tYW4tZWxkZXJsYXcuY29tL2hvd10by1wcmUtcGF5LWZvci1hLWZ1bmVyYWwv&guce_referrer_sig=AQAAADubcuMP94r0LtvIRetJzFVPQlik5o9jmi4TdjIAz7aAThiRrqkGii6Els5Npnkz-lb_KMoSb2-7aqHjXYLxk7tR-ZmH6MYygX-Eieu2vPRRIIZDB0qzof3OOWXR3HeJvNZTfCzHk2g9o6y5y5V-xgyuUx8a7el_LX1EPj5lrJF2

● **HOW TO PROTECT ELDERLY PARENTS FROM FINANCIAL SCAMS**

<https://www.cbsnews.com/news/money-scams-elder-fraud-abuse/>

● **CONVERSATIONS TO HAVE WITH YOUR SPOUSE BEFORE YOU RETIRE**

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

● **11 ACTIONS TO TAKE BEFORE RETIREMENT**

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

● **KEY METRICS CONSTRUCTION COMPANIES SHOULD WATCH**

<https://njcpa.org/article/2023/06/08/key-metrics-construction-companies-should-watch>

● **MORE FLEXIBILITY FOR SECTION 529 PLANS**

https://www.cpapracticeadvisor.com/2023/05/10/more-flexibility-for-section-529-plans/79408/?utm_source=CPA+Practice+Advisor&utm_campaign=cc2faff228-EMAIL_CAMPAIGN_2023_05_12_06_09&utm_medium=email&utm_term=0_-cc2faff228-%5BLIST_EMAIL_ID%5D

● **INSTALLING SOLAR PANELS OR MAKING OTHER HOME IMPROVEMENTS MAY QUALIFY TAXPAYERS FOR HOME ENERGY CREDITS**

<https://www.irs.gov/newsroom/installing-solar-panels-or-making-other-home-improvements-may-qualify-taxpayers-for-home-energy-credits>

● **HOW HOMEOWNERS QUALIFY FOR THE NEW ENERGY EFFICIENT TAX CREDITS**

https://www.cpapracticeadvisor.com/2023/05/11/how-homeowners-qualify-for/79589/?utm_source=CPA+Practice+Advisor&utm_campaign=16f370d2a4-EMAIL_CAMPAIGN_2023_05_14_02_55&utm_medium=email&utm_term=0_-16f370d2a4-%5BLIST_EMAIL_ID%5D

● **EMERGENCY PREPAREDNESS PLANS SHOULD INCLUDE FINANCIAL RECORDS AND TAX INFORMATION**

<https://www.irs.gov/newsroom/emergency-preparedness-plans-should-include-financial-records-and-tax-information>

● **IS IDENTITY THEFT PROTECTION WORTH THE COST?**

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

● **10 THINGS YOU NEED TO KNOW ABOUT HEALTH SAVINGS ACCOUNTS (HSAS)**

<https://www.visionretirement.com/articles/healthsavingsaccounts/shsa>

● **SALES TAXES IN SOUTH DAKOTA TO DECREASE**

https://www.cpapracticeadvisor.com/2023/05/17/sales-taxes-in-south-dakota-to-decrease/79788/?utm_source=CPA+Practice+Advisor&utm_campaign=06129bb388-EMAIL_CAMPAIGN_2023_05_21_09_59&utm_medium=email&utm_term=0_-06129bb388-%5BLIST_EMAIL_ID%5D

● **HOW TO EFFICIENTLY COMPLETE A BUSINESS PERSONAL PROPERTY RENDITION**

https://www.cpapracticeadvisor.com/2023/05/17/how-to-efficiently-complete-a-business-personal-property-rendition/79782/?utm_source=CPA+Practice+Advisor&utm_campaign=06129bb388-EMAIL_CAMPAIGN_2023_05_21_09_59&utm_medium=email&utm_term=0_-06129bb388-%5BLIST_EMAIL_ID%5D

● **CAN AN EMPLOYEE'S HOSTILE, ABUSIVE, OR OFFENSIVE SPEECH ACTUALLY BE PROTECTED AND, IF SO, WHEN?**

https://www.lexology.com/library/detail.aspx?g=8482def9-16af-416b-a6ef-383ff1055f1c&utm_source=lexology+daily+newsfeed&utm_medium=html+email+-+body+-+general+section&utm_campaign=lexology+subscriber+daily+feed&utm_content=lexology+daily+newsfeed+2023-05-23&utm_term=

● **HOW TO HAVE THE PRENUP CONVERSATION WITH YOUR FIANCÉ(E)**

https://www.lexology.com/library/detail.aspx?g=7f4741dd-463a-41d1-a1ba-b1fc97f67457&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-05-23&utm_term=

● **AN IDENTITY PROTECTION PIN HELPS SHIELD TAXPAYERS FROM TAX-RELATED IDENTITY THEFT**

<https://www.irs.gov/newsroom/an-identity-protection-pin-helps-shield-taxpayers-from-tax-related-identity-theft>

● **NEW JERSEY DIVISION OF TAXATION - COLLEGE AND TUITION ASSISTANCE**

<https://www.state.nj.us/treasury/taxation/individuals/collegededuction.shtml>

● **APPEAL A REJECTED OFFER IN COMPROMISE**

<https://www.irs.gov/newsroom/appeal-a-rejected-offer-in-compromise>

● **KEEP WHAT IS YOURS WITH PATENTS OR COPYRIGHTS**

https://business.nj.gov/pages/trademarks?utm_medium=email&utm_source=govdelivery

● **401(K) PLANS: CAN INTERNS BE EXCLUDED?**

https://www.lexology.com/library/detail.aspx?g=383a226c-f884-4bd9-9868-3a4e35f6784e&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-05-30&utm_term=

● **IN THE AFTERMATH OF LOSS: THE FIRST STEPS OF ESTATE ADMINISTRATION**

https://www.lexology.com/library/detail.aspx?g=59a32c30-b8d1-47c2-b077-5f1323be85f1&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-05-30&utm_term=

● **THERE'S STILL TIME TO FILE A 2019 TAX RETURN AND CLAIM VALUABLE TAX CREDITS**

<https://www.irs.gov/newsroom/theres-still-time-to-file-a-2019-tax-return-and-claim-valuable-tax-credits>

● **THE IRS ALERTS TAXPAYERS OF SUSPECTED IDENTITY THEFT BY LETTER**

<https://www.irs.gov/newsroom/the-irs-alerts-taxpayers-of-suspected-identity-theft-by-letter>

● **7 WAYS TO MAKE RETIREMENT MORE AFFORDABLE**

<https://www.visionretirement.com/articles/make-retirement-more-affordable>

● **NJ OFFERS SALES TAX HOLIDAY AUG 26 TO SEPT 4**

<https://www.state.nj.us/treasury/taxation/businesses/salestax/salestaxholiday.shtml>

● **THE FUTURE OF SELF-CUSTODY WALLETS: HOW TO STAY SECURE IN A CONNECTED WORLD**

<https://njcpa.org/article/2023/06/28/the-future-of-self-custody-wallets-how-to-stay-secure-in-a-connected-world>

● **ACCOUNTING FOR CRYPTO-NATIVE COMPANIES**

<https://njcpa.org/article/2023/06/27/accounting-for-crypto-native-companies>

● **GIG WORK IS TAXABLE. HERE'S SOME GUIDANCE**

<https://njcpa.org/article/2023/06/27/gig-work-is-taxable.-here's-some-guidance>

● **ARE YOU PREPARED TO COMPLY WITH THE PREGNANT WORKERS FAIRNESS ACT?**

https://www.lexology.com/library/detail.aspx?g=f3581acf-6b35-40f5-88f7-cab69d3d64a1&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-06-01&utm_term=

● **PAYERS MAY RECEIVE NOTICES CP2100 AND 2100A IF THEY FILED AN INFORMATION RETURN WITH ERRORS**

<https://www.irs.gov/newsroom/payers-may-receive-notices-cp2100-and-2100a-if-they-filed-an-information-return-with-errors>

● **TOP 6 MARRIAGE-KILLING MONEY ISSUES IN 2023**

<https://advisor.news/top-6-marriage-killing-money-issues-in-2023/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2lkIjo1OTExNSwicHJldmllYl6ZmFsc2UsImNvbW1faWQiOiJc4MTM3NzAsImRlc3RfaWQiOiQ5NTgwMzYsInJlYWRIcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.5jtsQBZkCEn8qVf4tWcqAKNrZQlj-LRgaW0cbG5dA4A>

● **MARRIAGE AND FINANCES: A TO-DO LIST**

<https://massmutual.advisorstream.com/marriage-and-finances-a-to-do-list/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2lkIjo1OTExNSwicHJldmllYl6ZmFsc2UsImNvbW1faWQiOiJc4MTM3NzAsImRlc3RfaWQiOiQ5NTgwMzYsInJlYWRIcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.5jtsQBZkCEn8qVf4tWcqAKNrZQlj-LRgaW0cbG5dA4A>

● **MONEY MOVES TO MAKE MID-YEAR**

<https://advisor.news/forbes/money/9-money-moves-to-make-mid-year/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2lkIjo1OTExNSwicHJldmllYl6ZmFsc2UsImNvbW1faWQiOiJc4MTM3NzAsImRlc3RfaWQiOiQ5NTgwMzYsInJlYWRIcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.5jtsQBZkCEn8qVf4tWcqAKNrZQlj-LRgaW0cbG5dA4A>

● **5 THINGS YOU NEED TO KNOW ABOUT LIFE INSURANCE**

<https://www.visionretirement.com/articles/5-key-things-about-life-insurance>

● **SUMMER TAX REMINDER**

Those who earn summer self-employment income should prepare for potential federal tax obligations. They should keep good records of all expenses to help maximize potential deductions & may also need to pay quarterly estimated tax to avoid IRS penalties.

● **NEW SCAM; UNUSUAL DELIVERY SERVICE MAILING TRIES TO TRICK PEOPLE INTO SENDING PHOTOS, BANK ACCOUNT INFORMATION**

<https://www.irs.gov/newsroom/irs-security-summit-partners-warn-taxpayers-of-new-scam-unusual-delivery-service-mailing-tries-to-trick-people-into-sending-photos-bank-account-information>

● **EVERYTHING YOU NEED TO KNOW ABOUT RESTRICTED GRANTS AND ENDOWMENTS**

https://www.lexology.com/library/detail.aspx?g=ced8c6dd-c2d9-4cf8-baa2-e701db981fce&utm_source=Lexology+Daily+Newsfeed&utm_medium=HTML+email+-+Body+-+General+section&utm_campaign=Lexology+subscriber+daily+feed&utm_content=Lexology+Daily+Newsfeed+2023-06-02&utm_term=

● **MORTGAGE PREAPPROVALS: WHAT YOU SHOULD KNOW**

<https://www.visionretirement.com/articles/mortgage-pre-approvals>

● **FEMA EMERGENCY DECLARATION FOR VERMONT**

<https://www.fema.gov/press-release/20230711/president-joseph-r-biden-jr-approves-emergency-declaration-vermont>

● **IRS: VERMONT FLOODING VICTIMS NOW ELIGIBLE FOR TAX RELIEF; OCT. 16 DEADLINE, OTHER DATES EXTENDED TO NOV. 15**

<https://www.irs.gov/newsroom/irs-vermont-flooding-victims-now-eligible-for-tax-relief-oct-16-deadline-other-dates-extended-to-nov-15>

● **PIERCING THE CORPORATE VEIL**

<https://njcpa.org/article/2023/07/12/piercing-the-corporate-veil>

● **6 PIECES OF ADVICE FOR STARTING A CONSULTING BUSINESS**

https://succeedasyourownboss.com/6-pieces-of-advice-for-starting-a-consulting-business/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone

● **INS AND OUTS OF THE HOME SALE EXCLUSION**

https://www.cpapracticeadvisor.com/2023/06/15/ins-and-outs-of-the-home-sale-exclusion/80947/?utm_source=CPA+Practice+Advisor&utm_campaign=1bd93375ba-EMAIL_CAMPAIGN_2023_06_16_06_42&utm_medium=email&utm_term=0_-1bd93375ba-%5BLIST_EMAIL_ID%5D

● **KEY IN ON IMPROVED HOME ENERGY CREDITS**

https://www.cpapracticeadvisor.com/2023/06/15/key-in-on-improved-home-energy-credits/80945/?utm_source=CPA+Practice+Advisor&utm_campaign=1bd93375ba-EMAIL_CAMPAIGN_2023_06_16_06_42&utm_medium=email&utm_term=0_-1bd93375ba-%5BLIST_EMAIL_ID%5D

● **TAX CURVE AHEAD FOR BUSINESS VEHICLE OWNERS**

https://www.cpapracticeadvisor.com/2023/06/14/tax-curve-ahead-for-business-vehicle-owners/80941/?utm_source=CPA+Practice+Advisor&utm_campaign=1bd93375ba-EMAIL_CAMPAIGN_2023_06_16_06_42&utm_medium=email&utm_term=0_-1bd93375ba-%5BLIST_EMAIL_ID%5D

● **FOREIGN INTRIGUE ON TAXABLE INCOME**

https://www.cpapracticeadvisor.com/2023/06/13/foreign-intrigue-on-taxable-income/80943/?utm_source=CPA+Practice+Advisor&utm_campaign=1bd93375ba-EMAIL_CAMPAIGN_2023_06_16_06_42&utm_medium=email&utm_term=0_-1bd93375ba-%5BLIST_EMAIL_ID%5D

● **AN OVERVIEW OF CATCH-UP CONTRIBUTIONS**

<https://www.visionretirement.com/articles/catch-up-contributions>

● **TAX IMPLICATIONS OF HIRING EMPLOYEES VS. INDEPENDENT CONTRACTORS**

<https://ifindtaxpro.com/tax-blog/tax-implications-of-hiring-employees-vs-independent-contractors/>

● **HOW DO CREDIT SCORES WORK?**

<https://www.thrivent.com/insights/magazine/summer-2023/how-do-credit-scores-work>

● **NJ GOVERNOR MURPHY SIGNS LEGISLATION ESTABLISHING HISTORIC EMPLOYMENT PROTECTIONS FOR SERVICE WORKERS**

https://nj.gov/governor/news/news/562023/approved/20230724b.shtml?utm_campaign=20230728digest&utm_medium=email&utm_source=govdelivery

● **IRS ENDS UNANNOUNCED REVENUE OFFICER VISITS TO TAXPAYERS**

<https://www.irs.gov/newsroom/irs-ends-unannounced-revenue-officer-visits-to-taxpayers-major-change-to-end-confusion-enhance-safety-as-part-of-larger-agency-transformation-efforts>

● **NEW JERSEY ENACTS PAYROLL TAX "CONVENIENCE OF EMPLOYER" RULE**

<https://njcpa.org/article/2023/08/02/new-jersey-enacts-payroll-tax-convenience-of-employer-rule>

● **IRS SENDS LETTERS ON POSSIBLE IDENTITY THEFT**

Some taxpayers will receive an IRS letter about possible theft of their identity if they suspect a scammer has used your personal info to attempt to claim a tax refund. Follow steps explained in the letter to keep yourself safe.

● **THE MOST COMMON SOCIAL SECURITY QUESTIONS, ANSWERED**

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

● **TAX TIPS FOR NEW PARENTS**

<https://www.irs.gov/newsroom/tax-tips-for-new-parents>

● **IRS QUIETLY CHANGED THE RULES ON INHERITANCE TAXES**

https://www.cpapracticeadvisor.com/2023/07/06/irs-quietly-changed-the-rules-on-your-childrens-inheritance/81820/?utm_source=CPA+Practice+Advisor&utm_campaign=74a6a1f24e-EMAIL_CAMPAIGN_2023_07_06_09_37&utm_medium=email&utm_term=0_-74a6a1f24e-%5BLIST_EMAIL_ID%5D

● **HOW TO DEDUCT BUSINESS EXPENSES WHILE ON VACATION**

https://www.cpapracticeadvisor.com/2023/07/06/how-to-deduct-business-expenses-while-on-vacation/81808/?utm_source=CPA+Practice+Advisor&utm_campaign=7d92077624-EMAIL_CAMPAIGN_2023_07_10_06_55&utm_medium=email&utm_term=0_-7d92077624-%5BLIST_EMAIL_ID%5D

● **HOW TO TRANSITION FROM PRIVATE HEALTH INSURANCE TO MEDICARE**

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

● **QUALIFIED CHARITABLE DISTRIBUTION (QCD): HOW IT CAN REDUCE TAXES DURING RETIREMENT**

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

● **WHAT CAREGIVERS CAN DO WHEN A BANK WON'T ACCEPT A POWER OF ATTORNEY**

<https://www.aarp.org/caregiving/financial-legal/info-2023/power-of-attorney-bank-approval.html>

● **POWERS OF ATTORNEY: CRUCIAL DOCUMENTS FOR CAREGIVING**

<https://www.aarp.org/caregiving/financial-legal/info-2019/types-of-power-of-attorney.html>

● **IDENTITY THEFT RED FLAGS TAX PROS SHOULD KNOW**

<https://www.irs.gov/newsroom/security-summit-reminder-identity-theft-red-flags-tax-pros-should-know>

● **ARE YOU MAKING EXTRA CASH SELLING STUFF OR PROVIDING A SERVICE?**

<https://www.youtube.com/watch?v=C1ueDRXJ7vY>

● **ROTH IRAS: WHAT THEY ARE AND HOW THEY WORK**

https://www.cpapracticeadvisor.com/2023/07/13/roth-iras-what-they-are-and-how-they-work/81984/?utm_source=CPA+Practice+Advisor&utm_campaign=25665baa46-EMAIL_CAMPAIGN_2023_07_13_02_50&utm_medium=email&utm_term=0_-25665baa46-%5BLIST_EMAIL_ID%5D

● **NJ SENIOR FREEZE CHANGES COMING NEXT YEAR**

Beginning with the 2023 filing season, the income limit for the Property Tax Relief program will increase to \$150,000 from \$99,735 & the requirement that an applicant must be a NJ resident for 10 consecutive years will be eliminated.

● **FREQUENTLY ASKED QUESTIONS ABOUT THE NEW JERSEY EXIT TAX**

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

● **CHECK YOUR MAILBOX: 1.3 MILLION ANCHOR RECIPIENTS IN NEW JERSEY TO RECEIVE CONFIRMATION THAT PROPERTY TAX BENEFIT WILL BE DISTRIBUTED AUTOMATICALLY THIS YEAR**

<https://nj.gov/governor/news/news/562023/approved/20230815c.shtml>

● **UPDATE ON THE AFFORDABLE NEW JERSEY COMMUNITIES FOR HOMEOWNERS AND RENTERS (ANCHOR) PROGRAM FOR 2020 BENEFITS**

<https://nj.gov/treasury/taxation/anchor/>

● **20 WAYS TO CREATE CUSTOMER VALUE**

https://succeedasyourownboss.com/20-ways-to-create-customer-value/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone

● **HOW TO KEEP YOURSELF MOTIVATED WHILE WRITING A BOOK**

https://succeedasyourownboss.com/how-to-keep-yourself-motivated-while-writing-a-book/?utm_source=email&utm_medium=broadcast&utm_campaign=ezone

● **SIGNS OF ELDER ABUSE**

<https://www.nursinghomeabusecenter.com/elder-abuse/signs/>

● **TAKING THE STRESS OUT OF FINANCIAL PLANNING**

<https://www.advisorstream.com/read/taking-the-stress-out-of-financial-planning/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2lkIjo1OTExNSwicHJldmllYl6ZmFsc2UsImNvbW1faWQiOiJyNTlyNTQsImRlc3RfaWQiOiJQ5NTgwMzYsInJlYWRlcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.4JVtXDGWJP-Zq4GnluGmlxtljlhZClS6pCLKzxLSXo>

● **HOW TO PREPARE YOUR PHONE AND OTHER TECH FOR A NATURAL DISASTER**

<https://www.advisorstream.com/read/how-to-prepare-your-phone-and-other-tech-for-a-natural-disaster/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2lkIjo1OTExNSwicHJldmllYl6ZmFsc2UsImNvbW1faWQiOiJyNTlyNTQsImRlc3RfaWQiOiJQ5NTgwMzYsInJlYWRlcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.4JVtXDGWJP-Zq4GnluGmlxtljlhZClS6pCLKzxLSXo>

● **GRANDPARENTS RAISING GRANDKIDS: 4 BIG CHALLENGES**

<https://massmutual.advisorstream.com/grandparents-raising-grandkids-4-big-challenges/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2lkIjo1OTExNSwicHJldmllYl6ZmFsc2UsImNvbW1faWQiOiJyNTlyNTQsImRlc3RfaWQiOiJQ5NTgwMzYsInJlYWRlcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.4JVtXDGWJP-Zq4GnluGmlxtljlhZClS6pCLKzxLSXo>

● **HOW TO MANAGE YOUR RISK VIA LIFE, LONG-TERM CARE INSURANCE**

<https://www.advisorstream.com/read/how-to-manage-your-risk-via-life-long-term-care-insurance/?c=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJub2RlX2lkIjo1OTExNSwicHJldmllYl6ZmFsc2UsImNvbW1faWQiOiJyNTlyNTQsImRlc3RfaWQiOiJQ5NTgwMzYsInJlYWRlcl9pZCI6bnVsbCwicGVyc29uYV9wcmV2aWV3IjpmYWxzZX0.4JVtXDGWJP-Zq4GnluGmlxtljlhZClS6pCLKzxLSXo>

● **CASH VS. CREDIT VS. DEBIT — WHICH SHOULD YOU USE?**

<https://www.moneyunder30.com/cash-vs-credit-vs-debit-which-should-you-use/>

● **5 COMMON ESTATE PLANNING MISTAKES TO AVOID**

<https://www.kiplinger.com/retirement/5-common-estate-planning-mistakes-to-avoid>

● **OUTSTANDING INVOICES? WHAT TO DO WHEN CUSTOMERS WON'T PAY THEIR BILL**

<https://www.businessnewsdaily.com/8246-non-paying-customers.html>

● **ESTATE PLANNING PITFALLS TO AVOID**

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

● **WHY ASKING FOR HELP IS NOT A SIGN OF WEAKNESS**

<https://www.linkedin.com/pulse/why-asking-help-sign-weakness-kate-boorer-fca#:~:text=Asking%20for%20help%20is%20not%20a%20sign%20of%20weakness%3B%20it's,a%20natural%20interest%20or%20capacity.>

● **WHAT SHOULD AND SHOULDN'T BE INCLUDED ON THE 2023 FORM 1099-K**

<https://njcpa.org/article/2023/08/28/what-should-and-shouldn't-be-included-on-the-2023-form-1099-k>

● **IRS ANNOUNCES ADMINISTRATIVE TRANSITION PERIOD FOR NEW ROTH CATCH-UP REQUIREMENT**

<https://njcpa.org/article/2023/08/25/irs-announces-administrative-transition-period-for-new-roth-catch-up-requirement>

● **TOP 5 CYBERSECURITY STEPS TO TAKE WITH DIGITAL ASSETS**

<https://njcpa.org/stayinformed/news/blog/post/njcpa-focus/2023/08/25/top-5-cybersecurity-steps-to-take-with-digital-assets>

● **CPAS TO CLIENTS: THE IRS IS COMING FOR CRYPTOCURRENCY**

<https://www.cpapracticeadvisor.com/2023/08/16/cpas-to-clients-the-irs-is-coming-for-cryptocurrency/93359/>

● **NEW JERSEY TREASURY UPDATES LIST OF UNCLAIMED PROPERTY**

<https://njcpa.org/article/2023/08/23/new-jersey-treasury-updates-list-of-unclaimed-property>

● **NEW SCHOOL YEAR REMINDER TO EDUCATORS: MAXIMUM EDUCATOR EXPENSE DEDUCTION IS \$300 IN 2023**

[https://njcpa.org/article/2023/08/22/new-school-year-reminder-to-educators-maximum-educator-expense-deduction-is-\\$300-in-2023](https://njcpa.org/article/2023/08/22/new-school-year-reminder-to-educators-maximum-educator-expense-deduction-is-$300-in-2023)

● **WHAT TO CONSIDER WHEN DOING A BANK RECONCILIATION FOR A CLIENT**

https://www.sage.com/en-us/blog/what-to-consider-when-doing-a-bank-reconciliation-for-a-client/?utm_campaign=NPS_23Q4_OT_US_SageAdviceAugust_Accountants&utm_medium=email&utm_source=Eloqua&elqct=272&elqcsid=5696

● **WHY DAILY BOOKKEEPING CAN LEAD TO HIGHER PROFITS AND HAPPIER CLIENTS**

https://www.sage.com/en-us/blog/daily-bookkeeping-higher-profits-happier-clients/?utm_campaign=NPS_23Q4_OT_US_SageAdviceAugust_Accountants&utm_medium=email&utm_source=Eloqua&elqct=272&elqcsid=5691

● **LATE PAYMENTS: WHY YOUR INVOICES ARE DELAYED AND HOW TO GET THEM PAID FASTER**

https://www.sage.com/en-us/blog/late-payments-get-paid-faster/?utm_campaign=NPS_17Q3_NCM_US_DGNL_NPS_Welcome&utm_medium=email&utm_source=Eloqua

● **A GUIDE TO BASIC ACCOUNTING FOR MANUFACTURING BUSINESSES**

<https://www.sage.com/en-us/blog/a-guide-to-basic-accounting-for-manufacturing-businesses/>

● **WHAT IS DEFERRAL IN ACCOUNTING?**

<https://www.sage.com/en-us/blog/what-is-deferral-in-accounting/>

● **EVERYTHING YOU NEED TO KNOW ABOUT 401(K)S**

<https://www.visionretirement.com/articles/guideto401ks>

● **FINDING AN ELDER CARE LAWYER**

<https://www.seasons.com/finding-an-elder-care-lawyer/2623231/>

● **FLORIDA EXTENDS CORPORATE TAX DUE DATE**

<https://www.ficpa.org/publication/dor-grants-corporate-income-tax-relief-those-impacted-idalia>

● **TREASURY ANNOUNCES CHANGE IN GAS TAX RATE EFFECTIVE OCTOBER 1**

<https://www.nj.gov/treasury/news/2023/09012023.shtml>

● **CPA ENGAGEMENT LETTER DOS AND DON'TS**

<https://njcpa.org/article/2023/08/31/engagement-letter-dos-and-don-ts>

● **IRS ANNOUNCES TAX RELIEF FOR THOSE IMPACTED BY IDALIA IN FLORIDA**

<https://www.irs.gov/newsroom/irs-announces-tax-relief-for-those-impacted-by-idalia-in-florida#:~:text=WASHINGTON%20%E2%80%94%20The%20Internal%20Revenue%20Service,returns%20and%20make%20tax%20payments.>

● **IRS PLANS TO RAMP UP ENFORCEMENT ON MILLIONAIRES, PARTNERSHIPS, AND CRYPTO—AND TO HARNESS AI**

<https://www.forbes.com/sites/kellyphillipserb/2023/09/08/irs-announces-plans-to-ramp-up-enforcement-on-millionaires-partnerships-and-crypto-users/?sh=5cee35e6674a>

● **BUSINESSES MUST ELECTRONICALLY FILE FORM 8300, REPORT OF CASH PAYMENTS OVER \$10,000, BEGINNING JAN. 1, 2024**

<https://www.irs.gov/newsroom/businesses-must-electronically-file-form-8300-report-of-cash-payments-over-10000-beginning-jan-1-2024>

● **IRS REMINDS GIG WORKERS, SELF-EMPLOYED AND OTHERS OF SEPT. 15 THIRD QUARTER ESTIMATED TAX PAYMENT DEADLINE**

<https://www.irs.gov/newsroom/irs-reminds-gig-workers-self-employed-and-others-of-sept-15-third-quarter-estimated-tax-payment-deadline>

● **THE TAX PAYOFF FOR LIFE INSURANCE**

https://www.cpapracticeadvisor.com/2023/07/28/the-tax-payoff-for-life-insurance/82314/?utm_source=CPA+Practice+Advisor&utm_campaign=edaddc0a65-EMAIL_CAMPAIGN_2023_07_31_05_14&utm_medium=email&utm_term=0_-edaddc0a65-%5BLIST_EMAIL_ID%5D

● **PROS AND CONS OF THE “KIDDIE TAX”**

https://www.cpapracticeadvisor.com/2023/07/28/pros-and-cons-of-the-kiddie-tax/82312/?utm_source=CPA+Practice+Advisor&utm_campaign=edaddc0a65-EMAIL_CAMPAIGN_2023_07_31_05_14&utm_medium=email&utm_term=0_-edaddc0a65-%5BLIST_EMAIL_ID%5D

● **FINANCIAL CONSIDERATIONS TO MAKE BEFORE GETTING A DIVORCE**

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

● **IRS ORDERS IMMEDIATE STOP TO NEW EMPLOYEE RETENTION CREDIT PROCESSING AMID SURGE OF QUESTIONABLE CLAIMS; CONCERNS FROM TAX PROS**

<https://www.irs.gov/newsroom/to-protect-taxpayers-from-scams-irs-orders-immediate-stop-to-new-employee-retention-credit-processing-amid-surge-of-questionable-claims-concerns-from-tax-pros>

● **RED FLAGS FOR EMPLOYEE RETENTION CREDIT CLAIMS; IRS REMINDS BUSINESSES TO WATCH OUT FOR WARNING SIGNS OF AGGRESSIVE PROMOTION THAT CAN MISLEAD PEOPLE INTO MAKING IMPROPER ERC CLAIMS**

<https://www.irs.gov/newsroom/red-flags-for-employee-retention-credit-claims-irs-reminds-businesses-to-watch-out-for-warning-signs-of-aggressive-promotion-that-can-mislead-people-into-making-improper-erc-claims>

● **IRS ANNOUNCES TAX RELIEF FOR TAXPAYERS IMPACTED BY HURRICANE IDALIA IN PARTS OF GEORGIA**

<https://www.irs.gov/newsroom/irs-announces-tax-relief-for-taxpayers-impacted-by-hurricane-idalia-in-parts-of-georgia>

● **11 WAYS TO MANAGE SUNDOWN SYNDROME - HOW DEMENTIA CAREGIVERS CAN SOOTHE ANXIETY IN THE EVENING**

https://www.aarp.org/caregiving/health/info-2017/ways-to-manage-sundown-syndrome.html?CMP=EMC-MIM-GOI-OTH-CG-1491200-1800702-7593536-NA-09142023-BackToSchool_MembersPE-MS3-SundownSyndrome-TXT-P1_PEMB-Caregiving&encparam=kliG6O%2bIsoSuhDojP4r%2fWSoiEOw0cSzGvRL8njqirQ0%3d

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