



## [Electronic Filing Services](#)

The IRS is scheduled to begin accepting e-filed personal tax returns on January 23, 2017. E-filing is mandatory under our license, except in rare instances when a return is required to be paper-filed. E-filing also enables us to receive your signature by fax or scan potentially saving an extra trip to our office.

We generally e-mail a secure copy of your return for review. It is strongly recommended that you review your return thoroughly for errors and omissions (including spelling and address changes) before signing. A PDF copy of your tax return will be sent from [LWalker@4-serenity.com](mailto:LWalker@4-serenity.com) (securely) via Citrix ShareFile.

## Refund and Payment Options

**Refunds** – Refunds for returns claiming the Earned Income Tax Credit (EITC) and Additional Child Tax Credit (CTC) will not be released from the IRS until February 15th. Note: Returns claiming the EITC or CTC may take up to four weeks to process.

- **Direct Deposit** (recommended) – Refunds normally arrive within 10 to 21 days with no additional fees. You are allowed to have your refund direct deposited in up to three separate bank accounts. We do not charge additional fees for this service, as long as tax preparation fees are paid at the time of service, or by e-check authorization.
- **Paper Checks** (not recommended) - You may also receive your refund in the form of a paper check. Refunds by check are generally received in 4 to 6 weeks. Refunds by check are not recommended because they may be lost in the mail, damaged, or stolen in transit.

**Paying Tax Preparation Fees** – Tax preparation fees are due upon completion of your return. In order to keep our fees reasonable, we no longer offer fee based refund settlement products. Instead, we offer settlement of accounts via electronic checks authorized on a designated day, free of charge. We also accept Visa, MasterCard, American Express, and Discover, checks, cash and electronic checks.

**If you owe taxes** – If you owe Federal or State Taxes you may choose to have your payment debited from your checking account at no cost, at the time of filing. If filed before April 18th you may choose to set up the payment for debit on April 18th. After April 18th your payment date must be the same as the filing date. Scheduling a direct debit from your checking account at the time the return is filed is the fastest, easiest, and cheapest way to pay (it's free).

The IRS also offers [Direct Pay](#), a secure service in which your payment may be debited from a bank account at no cost. Direct debit is also available for most State tax agencies. You may also make payments by credit card, however, be aware that private companies offering credit card processing for the government charge fees of up to 2.49%. You always have the option of mailing a check or money order along with the Payment Voucher printed with your tax return.

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## 2017 Tax Calendar and Filing Options

### **January 17, 2017**

- 4th and final installment of 2016 Estimated Tax Payments for individuals. Filing your personal tax return by January 31 and paying any balance due is the only other way to avoid an estimated tax penalty.
- Due date for employee deferral contributions to SEP/IRA, SIMPLE, and Solo 401K retirement accounts.
- Monthly payroll tax deposits due for monthly payers.

### **January 23, 2017**

- The IRS is scheduled to begin accepting individual tax returns on Monday, January 23, 2017.

### **January 31, 2017**

- Due date for 4th Quarter Payroll Tax Returns, and for filing W-2 and 1099 forms. [Accounting information must be received by January 10th].
- Quarterly payroll tax deposits due for quarterly payers.

### **February 15, 2017**

- Monthly payroll tax deposits due for monthly payers.

### **March 15, 2017**

- Due date for Partnership and S-Corporation Tax Returns, or 6-month extensions up to September 15th. If tax is owed full payment is due today.
- Due date for Employer Matching Contributions to SEP, SIMPLE and 401K Retirement Plans without an extension.
- Monthly payroll tax deposits due for monthly payers.

### **April 18, 2017**

- Due date for C-Corporation, Individual, and Estate & Trust Tax Returns, or 6-month extensions up to October 16th. If tax is owed full payment is due today.
- Final due date for 2016 IRA, Roth IRA, and Individual Health Savings Account contributions.
- Sole Proprietors (Schedule C) due date for SEP, SIMPLE and Single-K Retirement Contributions.
- 1st Installment due date for 2017 Estimated Tax Payments for Individuals and Corporations.
- Monthly payroll tax deposits due for monthly payers.

### **May 1, 2017**

- Due date for 1st Quarter Payroll Tax Returns. [Accounting information must be received by April 10th].
- Quarterly payroll tax deposits due for quarterly payers.

### **May 15, 2017**

- Due date for Calendar Year Exempt Organization Tax Returns, or 6-month extensions up to November 15th.
- Monthly payroll tax deposits due for monthly payers.

### **June 15, 2017**

- 2nd Installment due date for 2017 Estimated Tax Payments for Individuals and Corporations.
- Monthly payroll tax deposits due for monthly payers.

### **July 31, 2017**

- Due date for 2nd Quarter Payroll Tax Returns. [Accounting information must be received by July 10th].
- Quarterly payroll tax deposits due for quarterly payers.

### **August 15, 2017**

- Monthly payroll tax deposits due for monthly payers.

### **September 15, 2017**

- Final due date for Partnership and S-Corporation Tax Returns with extension filed by March 15th.
- Final due date for Employer Matching Contributions to SEP, SIMPLE and 401K Retirement Plans with an extension.
- 3rd Installment due date for 2017 Estimated Tax Payments for Individuals and Corporations.
- Monthly payroll tax deposits due for monthly payers.

### **October 16, 2017**

- Final due date for C-Corporation, Individual and Estate & Trust Income Tax Returns with extension filed by April 18th. Note: If tax is owed, full payments was due on April 18th.
- Monthly payroll tax deposits due for monthly payers.

### **October 31, 2017**

- Due date for 3rd Quarter Payroll Tax Returns. [Accounting information must be received by October 10th].
- Quarterly payroll tax deposits due for quarterly payers.

### **November 15, 2017**

- Final due date for Calendar-Year Non-Profit Returns with extension filed by May 15th.
- Monthly payroll tax deposits due for monthly payers.

### **December 15, 2017**

- 4th and final installment due date for 2017 Estimated Tax Payments for Corporations.
- Monthly payroll tax deposits due for monthly payers.

### **January 16, 2018**

- 4th and final installment of 2017 Estimated Tax Payments for individuals. Filing and paying the balance due by January 31st is the only other way to avoid an estimated tax penalty.
- Due date for employee deferral contributions to SEP/IRA, SIMPLE, and Solo 401K retirement accounts.
- Monthly payroll tax deposits due for monthly payers.