



[Electronic Filing Services](#)

The IRS is scheduled to begin accepting electronically filed personal tax returns on January 27th. E-filing is mandatory under our license, except in rare instances where a return can only be paper-filed. E-filing also enables us to receive your signature electronically, potentially saving an extra trip to our office.

Where possible, we will e-mail a secure copy of your return for review along with an electronic signature document. It is strongly recommended that you review your return thoroughly for errors and omissions (including name and address changes) before signing. Your return and signature forms will be sent (securely) via ShareFile and RightSignature. Visit our [Client Portal](#) page for instructions.

Refund and Payment Options

Refunds – The IRS reminds taxpayers that refunds claiming the Earned Income Tax Credit (EITC) and Additional Child Tax Credit (ACTC) will not be released before the end of February. Returns claiming the EITC or ACTC will take up to four weeks to process.

- **Direct Deposit** (recommended) – Refunds normally arrive within 10 to 21 days with no additional fees. You may have your refund direct deposited in up to three separate bank accounts. There are no additional fees for direct deposit, if 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. They are not recommended because checks 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. To keep your 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, Discover, checks, cash and electronic checks at the time of service.

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 additional cost, at the time of filing. If you file before the April 15th deadline, you may choose to have the amount owed debited on, or before, April 15th. After April 15th the payment date must match the filing date. Scheduling a direct debit from your checking account at the time the return is filed is the fastest, safest, 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 with most State tax agencies. You may also make payments by credit card, however, be aware that private companies offer credit card processing for the government and charge fees of up to 2.49%. You always have the option of mailing a check

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or money order (although not recommended) along with the Payment Voucher printed with your tax return.

2020 Tax Calendar

January 15, 2020

- 4th and final installment of 2019 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 27, 2020

- The IRS is scheduled to begin accepting individual tax returns in late January. The exact date was unknown at the time of writing.

January 31, 2020

- 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 17, 2020

- Monthly payroll tax deposits due for monthly payers.

March 16, 2020

- 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 on this date.
- Due date for Employer Matching Contributions to SEP, SIMPLE and 401K Retirement Plans without an extension.
- Monthly payroll tax deposits due for monthly payers.

Read our online newsletter at <https://www.4-serenity.com/newsletter/>

April 15, 2020

- Due date for C-Corporation, Individual, and Estate & Trust Tax Returns, or 6-month extensions up to October 15th (5-months for Estates and Trusts). If tax is owed full payment is due today.
- Final due date for 2019 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 2020 Estimated Tax Payments for Individuals and Corporations.
- Monthly payroll tax deposits due for monthly payers.

April 30, 2020

- 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, 2020

- Due date for Calendar Year Exempt Organization Tax Returns, or 6-month extensions up to November 16th.
- Monthly payroll tax deposits due for monthly payers.

June 15, 2020

- 2nd Installment due date for 2020 Estimated Tax Payments for Individuals and Corporations.
- Monthly payroll tax deposits due for monthly payers.

July 31, 2020

- 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 17, 2020

- Monthly payroll tax deposits due for monthly payers.

September 15, 2020

- Final due date for Partnership and S-Corporation Tax Returns with extension filed by March 16th.
- Final due date for Employer Matching Contributions to SEP, SIMPLE and 401K Retirement Plans with an extension.
- 3rd Installment due date for 2020 Estimated Tax Payments for Individuals and Corporations.
- Monthly payroll tax deposits due for monthly payers.

October 15, 2020

- Final due date for C-Corporation, Individual and Estate & Trust Income Tax Returns with extension filed by April 15th. Note: If tax is owed, full payments was due on April 15th.
- Monthly payroll tax deposits due for monthly payers.

November 2, 2020

- 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 16, 2020

- 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, 2020

- 4th and final installment due date for 2020 Estimated Tax Payments for Corporations.
- Monthly payroll tax deposits due for monthly payers.

January 15, 2021

- 4th and final installment of 2020 Estimated Tax Payments for individuals. Filing and paying the balance due by February 1st 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.