

TAX SEASON TIMELINE SUMMARY

Date	Event	Return Type	Action
Jan 15	1099 ready for your review	Business	Review vendors and upload W9s
Feb 1	Open Items List is published	Business	Set filing preference and complete your open items
Feb 15 - Mar 1	Returns ready for signature	Business	Sign your return, pay your state liability (if applicable)
Feb 15	Open Items List is published	Personal (1040)	Set filing preference, upload all (available) tax documents, confirm return information
March 16	Business returns due date	Business	If you are not on extension, your return (and K-1) will be available. If you are doing you're not doing your personal return (1040) with Formations, send the package to your accountant.
March 16	Complete your open items list and confirm filing by the deadline	Personal (1040)	If you have not filed your business return, you will have to extend your personal return filing.
March 16 - April 8	Review and sign your return	Personal (1040)	Review for accuracy and completeness. Send corrections if needed or schedule review call.
April 15	Personal return (1040) and tax payments due date	Personal (1040)	Tax payments are due even if you file by the extension deadline. Payment information and guidance will be in your account.