



News, information, perspectives for households, investors, individuals  
and retirement minded clients of Nagel CPAs, LLC.

**Demand is  
stronger than  
ever. We're  
Hiring!**

We are currently seeking to fill all levels of tax professionals:

- \*[Staff Accountant](#)
- \*[Seasonal Technical Tax Reviewer](#)
- \*[Mid-Level Tax Manager](#)
- \*[Director of Tax Planning and Compliance](#)

Follow the links above to our website for complete job descriptions. Please email resumes with a cover letter to [rlamar@nagelcpa.us](mailto:rlamar@nagelcpa.us)

### *The final push...*

The final ten weeks of the 2021 filing season is now upon us. Here's a few tips and reminders to help out:

1. The deadline for all pass through entities (PTE) is September 15. That means if you are a partner in a partnership or a shareholder in an S-corporation we will need a K-1 from that entity before we can prepare your 1040 by the October 15 deadline.

If you need us to prepare the underlying 1065 or 1120S and related K-1's, we need your books and records, **right now!** Our deadline to guarantee delivery by September 15 was August 1.

2. As you wait for us to prepare your PTE returns and related K-1's, focus on organizing the tax data for your individual returns. We must have that data in our queue by September 1 to guarantee October 15 delivery.

3. The tax organizer sent to you in late December or early January has important inquiries in it, especially the first few pages of questions. The IRS has required we ask and document our files that you have answered these questions. If you do not answer them from our inquiry in the organizer we will have to stop and call before can complete our work. This causes greater delays.

4. We always attempt to address the next year's estimated payments to help you avoid underpayment penalties. Please provide very clear instructions on the payments you made for 2021 and for 2022. Sending check copies will help. Do not forget the payment you made with your extension at April 18.

5. Plan ahead for next year. See my recent article on this subject. [Click here:](#)

### *Kudos to the staff!*

We have been fortunate to fill staffing vacancies this year with permanent and seasonal professionals. What a blessing. Thanks to all who have worked so hard under difficult circumstances to get the work out, efficiently and accurately. Your compliments are appreciated.

### ***New client acceptances.***

While demand is higher than ever, we will continue to limit the number of new clients accepted for the next six to nine months. As qualified referral sources, your referrals are a priority. Unfortunately, we may not be able to effectively serve them all. If you want to help someone by referring them to us for help, feel free to call in advance to see if we can accommodate their needs.

### ***Extra demand on our time.***

Several unexpected trends have surfaced that have created an even greater need for experienced professionals.

Five major laws affecting the tax code and policy have been passed since March of 2020, with little or no regulations.

The IRS and the NMTRD continue to work at “Post Pandemic” re-organizing from resignations and staff reluctance to return to work in the office from remote locations. It is a slow and excruciating exercise.

On a brighter note, as we help clients prepare for retirement, business and real estate sales abound. These transactions take time to plan for, think through and get executed.

Lastly, as expected, demand for trust, gift and estate services have been increasing. So have the number of estate settlements we have been called upon to help with.

While we are very fortunate to have friendly relationships with colleagues across the country when encountering special requirements, upcoming retirements in our office are driving our need to continue to build and develop our personnel.

We have a great work environment, with strong values and wonderful opportunities for advancement.

You know that. Help us by telling everyone you know in our field. We need your help.

Read this Dave Ramsey article on the Fed’s recent and future rate hikes. Don’t get caught off guard. [Click here.](#)

Roger C. Nagel, CPA/PFS, CMA, CGMA



*If you know someone that would benefit from the information provided in these newsletters please contact [rlamar@nagelcpa.us](mailto:rlamar@nagelcpa.us), or call 505-898-2558 to add them to our subscriber list.*

Visit our website



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