

Accountant Year-End Toolkit

Inside this toolkit you'll find some useful resources to share with your clients to help ensure a smooth end of year:

- Year-End Payroll Checklist
- 2024 Payroll Calendar
- Year-End Client Letter Template
- Officer-only S Corp Payroll Brochure



Customize these and other useful materials with your firm logo and contact info to share with clients! Access our free Accountant Marketing Toolkit today at adp.countingworkspro.com.



Year-End Payroll Checklist

Need help completing the tasks below? Type the into the Search Bar in the RUN Powered by ADP® payroll platform!

Join our **FREE WEBINARS** to learn more about how to complete key tasks, year-end reporting best practices and navigating compliance trends

adp.com/resources/events

Report Pay by **December 29**

Report (such as S Corp Earning or Group Term Life Insurance)

File

Process payrolls

Sign up to receive

Determine whether you need to report for the (ACA)

Prepare (EITC) notifications for your employees

Run your last payroll by December 29, including any payrolls or (last payroll should be hidden within run).

Review your report

Stop retirement plan

Review (W-2s and 1099s) online in the RUN Powered by ADP® platform starting on January 3, 2024

Clear for Year-End

Update

Review 2024 changes

Tell employees and contractors to download their (W-2s or 1099s)

You

Distribute and (EITC) notifications to employees and contractors by **January 31, 2024**

The information in this guide is provided solely as a courtesy and should not be construed as legal, financial or tax advice. Please review applicable law in your jurisdiction and consult your legal counsel or tax professional for updates on law and guidance that may have an impact on your organization and the specific facts related to your business.

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2024 Payroll Calendar

January

S	M	T	W	T	F	S
1	1	2	3	4	5	6 2
2	7	8	9	10	11	12 13 3
3	14	15	16	17	18	19 20 4
4	21	22	23	24	25	26 27 5
5	28	29	30	31		

February

S	M	T	W	T	F	S
5					1	2 3 6
6	4	5	6	7	8	9 10 7
7	11	12	13	14	15	16 17 8
8	18	19	20	21	22	23 24 9
9	25	26	27	28	29	

March

S	M	T	W	T	F	S
						1 2 10
10	3	4	5	6	7	8 9 11
11	10	11	12	13	14	15 16 12
12	17	18	19	20	21	22 23 13
13	24	25	26	27	28	29 30 14
14	31					

April

S	M	T	W	T	F	S
14		1	2	3	4	5 6 15
15	7	8	9	10	11	12 13 16
16	14	15	16	17	18	19 20 17
17	21	22	23	24	25	26 27 18
18	28	29	30			

May

S	M	T	W	T	F	S
18			1	2	3	4 19
19	5	6	7	8	9	10 11 20
20	12	13	14	15	16	17 18 21
21	19	20	21	22	23	24 25 22
22	26	27	28	29	30	31

June

S	M	T	W	T	F	S
						1 23
23	2	3	4	5	6	7 8 24
24	9	10	11	12	13	14 15 25
25	16	17	18	19	20	21 22 26
26	23	24	25	26	27	28 29 27
27	30					

July

S	M	T	W	T	F	S
27		1	2	3	4	5 6 28
28	7	8	9	10	11	12 13 29
29	14	15	16	17	18	19 20 30
30	21	22	23	24	25	26 27 31
31	28	29	30	31		

August

S	M	T	W	T	F	S
31				1	2	3 32
32	4	5	6	7	8	9 10 33
33	11	12	13	14	15	16 17 34
34	18	19	20	21	22	23 24 35
35	25	26	27	28	29	30 31 36

September

S	M	T	W	T	F	S
36	1	2	3	4	5	6 7 37
37	8	9	10	11	12	13 14 38
38	15	16	17	18	19	20 21 39
39	22	23	24	25	26	27 28 40
40	29	30				

October

S	M	T	W	T	F	S
40		1	2	3	4	5 41
41	6	7	8	9	10	11 12 42
42	13	14	15	16	17	18 19 43
43	20	21	22	23	24	25 26 44
44	27	28	29	30	31	

November

S	M	T	W	T	F	S
					1	2 45
45	3	4	5	6	7	8 9 46
46	10	11	12	13	14	15 16 47
47	17	18	19	20	21	22 23 48
48	24	25	26	27	28	29 30 49

December

S	M	T	W	T	F	S
49	1	2	3	4	5	6 7 50
50	8	9	10	11	12	13 14 51
51	15	16	17	18	19	20 21 52
52	22	23	24	25	26	27 28 53
53	29	30	31			

■ = ADP processing week number
(Sunday - Thursday)

■ = ADP processing week number
(Friday & Saturday)

If you make a schedule change, please check your Payroll
Schedule to be sure you use the correct week number.

□ = ADP, Federal Reserve, and banks are closed.
Allow an extra day for direct deposit.

○ = Federal Reserve is closed. Most banks closed.
Allow an extra day for direct deposit.

Dear Client,

It's hard to believe we've nearly reached the end of 2023.

This past year, many of our clients started to explore how artificial intelligence can aid productivity, especially those that struggled to find and retain employees in a tight labor market. We also saw legislation bring changes impacting state-mandated retirement plans and pay transparency laws.

As business owners ourselves, we know firsthand how difficult it is to keep pace with constant change. Having the right solutions to help keep your business compliant and stay focused on your goals is critical, which is why our firm partners with ADP®.

ADP helps our clients implement easy-to-use tools that can simplify how you pay and manage your people. For example, ADP Retirement Services can assist with choosing and implementing a retirement plan that satisfies your organizations business requirements while minimizing your administrative work. ADP's small business payroll & HR platform, RUN Powered by ADP®, leverages AI-powered features to help flag payroll errors before they happen.

If you are interested in any of ADP's HR, payroll and benefits solutions, please contact me or our ADP sales representative directly:

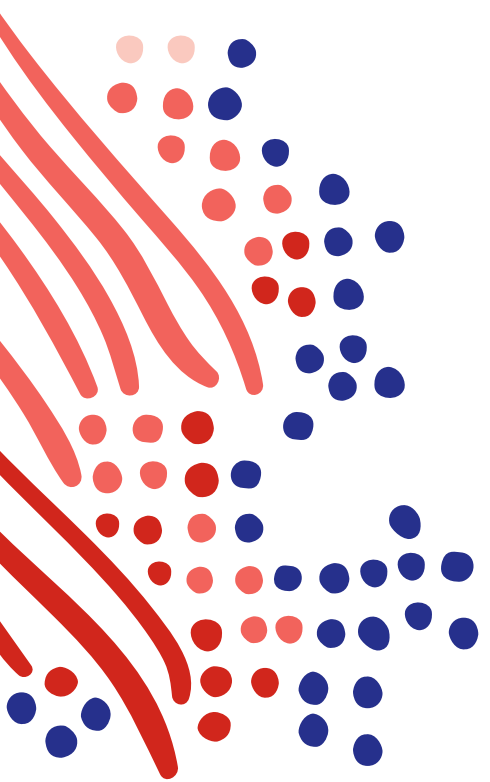
We appreciate and value your business. We look forward to serving you again in 2024.

Regards,



S corp payrolls made easy

Save time & handle compliance headaches with ADP's S corp payroll offering



Whether it's in December or spread throughout the year, as an officer only S corporation you need to pay yourself a reasonable salary. In addition to determining what a reasonable salary would be, you're also responsible for all the tax and payroll obligations that go along with it.

Get ahead of year-round compliance activities with our full-service officer only S corporation payroll offering from ADP®.

- Choose the pay frequency and payment option that fits best, including the option to process one-time annual payrolls
- Simple reporting of fringe benefits on annual forms
- Automated notifications when deadlines are approaching
- Filing of federal, state and local taxes & forms
- Comprehensive reporting tools & general ledger integration at your fingertips
- Optional retirement product solutions that integrate directly with payroll

**Packages starting at: \$127.50 / Quarter
(\$500 for one-time annual payrolls)**

No limit on # of shareholder-employees*

**Monthly, biweekly and weekly pay frequencies also available.
Contact your local ADP sales representative for pricing.**

**Onboarding is fast, easy and affordable.
Contact us today to learn more.**



*For annual and quarterly pay frequencies only through RUN Powered by ADP®.

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