Corient Tax Services: Imperative Deadlines and Timeline

12/01/2025

Deadline for new prospect quoting for Spring prep

Our tax fee request checklist and prior year returns must be provided by this date to be considered for Spring 2026 preparation

Returns that require extensions can be considered after this date on a client-by-client basis, depending on circumstances and capacity

2/15/2026

Deadline to submit tax information to file 3/15/2026 due date returns (1065/1120S); otherwise, filing date will be extended

3/23/2026

Deadline to submit tax information to be used in an extension estimate/analysis

8/15/2026

Deadline to submit a new tax prospect for summer / fall 2026 tax filing work

Early December, 2025

The engagement letter delivery process started in early December for new clients. Renewal clients are in process and will be delivered through December/early January.

1/15/2026

Clients must engage us / **accept proposals** by 1/15/2026

3/15/2026

Deadline to **submit tax information to file 4/15/2026** due date returns; otherwise, filing date will be extended

4/15/2026

Deadline to submit tax information for 5/15/2026 returns (990/990PF); otherwise, filing date will be extended

9/15/2026

Deadline to submit all non-K-1 tax information; otherwise, we cannot guarantee timely filing

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