

State and Local Taxes 101

This playbook provides an overview of state and local tax systems. It outlines the essentials of filing and paying these taxes as additional responsibilities alongside federal obligations.

Step 1: **Research**

Determine your state and local tax requirements based on your residence, employment, and other relevant factors.

Step 2: **Documentation**

Gather all necessary documents related to income, property, sales tax, and other applicable taxes.

Step 3: **Filing**

Complete the appropriate state and local tax forms, ensuring accuracy and compliance with the current tax laws.

Step 4: **Payments**

Calculate the total tax liability and make payments by the due date, which may vary by state and locality.

Step 5: **Records**

Keep copies of all tax filings and proof of payment for at least the minimum period required by law.

General Notes

Tax Software

Consider using tax software or a tax professional to help navigate state and local tax laws, especially if you have complex tax situations.

Deadlines

Be aware that state and local tax deadlines may not align with federal tax deadlines. Check the dates annually to avoid penalties.

Updates

Stay informed about changes in tax law that may affect state and local tax rates, deductions, and credits.

Assistance

Most states offer taxpayer assistance services, which can provide help or answer questions about state tax obligations.