



MIDLOTHIAN TAX & BUSINESS SERVICES

Serving Individuals, Families & Businesses
Throughout Ellis County and Beyond

QUARTERLY TAX & FINANCIAL UPDATE

Q3 • 2026 | *Back-to-School & Mid-Year Planning Edition*

Local Focus. Personal Service. Lasting Results.



ANNOUNCEMENTS



Mid-Year Financial Checkup

The second half of the year is the perfect time to review your tax strategy and overall financial picture. A mid-year review can uncover opportunities for tax planning, retirement planning, trusts, insurance, and asset protection while there's still time to make meaningful changes before year-end.



Extension Filers – Schedule Now

If you filed a tax extension, reserve your appointment today so we can complete your return well before the October 15 filing deadline.



Trust & Estate Planning Seminar

Protect What Matters Most

Join us for a complimentary educational seminar covering:

- Wills vs. Trusts
- Avoiding Probate
- Protecting Your Assets
- Planning for Your Family's Future

Reserve your seat today!



REGISTER: eventcreate.com/e/myfreedomrlt

Tuesday, August 18 – 10 AM or 6 PM
Thursday, August 20 – 10 AM or 6 PM



IMPORTANT DATES



SEPTEMBER 15

- Q3 Estimated Tax Payments Due



SEPTEMBER 15

- Partnership & S Corporation Returns Due (Extension Filers)



OCTOBER 15

- Individual Tax Returns Due (Extension Filers)



OCTOBER 31

- Quarterly Payroll Tax Return (Form 941) Due



TAX TIPS

- ✓ Keep business and personal expenses separate.
- ✓ Track deductible mileage and business expenses throughout the year.
- ✓ Review retirement contributions before year-end.
- ✓ Contact us before making major financial decisions—not after.



DID YOU KNOW?

Financial Freedom Starts with Smart Planning

Taxes are only one piece of your financial picture.

During your tax review, we may identify opportunities related to:



Retirement Planning



Estate & Trust Planning



Insurance Reviews



Asset Protection



Business Planning

If additional planning would benefit you, we'll connect you with trusted professionals who can help coordinate a strategy tailored to your goals.

Late Summer Recipe

APPLE PECAN CHICKEN SALAD

A fresh, healthy meal that's perfect for late summer and back-to-school season.

INGREDIENTS

- 2 cups cooked chicken, diced
- 1/4 cup chopped pecans
- 1 apple, diced
- 1/3 cup Greek yogurt
- 1/2 cup red grapes, halved
- 1 tbsp Dijon mustard
- 1/4 cup chopped celery
- Salt & pepper to taste

Toss all ingredients together and serve over greens, in a wrap, or with crackers. Enjoy!



Upcoming Educational Seminar

TRUST & ESTATE PLANNING SEMINAR

PROTECT WHAT MATTERS MOST

Learn how trusts and estate planning can help protect your family, your assets, and your legacy.



REGISTER TODAY!

Reserve your seat at:

eventcreate.com/e/myfreedomrlt



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- Financial Planning Resources

Thank you for your continued trust and support!

Helping Individuals, Families & Businesses Make Smarter Financial Decisions.