

Formal Request for an Extension of Time to Complete Your Tax Return

Your answers to these questions will allow us to make the best guess available to determine how much tax you need to send to IRS NOW to avoid future penalties. Please complete this form and return to Accu-Tax.

<u>Step 1</u>	
Taxpayer: _____	SSN: _____
Spouse: _____	SSN: _____
Address: _____	# of Dependents UNDER 17 yrs old: _____
_____	# of Dependents UNDER 19 yrs old: _____
_____	# of Dependents OVER 25 yrs old: _____
Phone: _____	# of College kids UNDER 25 yrs old: _____

Step 2 for Employees

Do you work for a company that takes taxes out of your paycheck for you? If not, go to step 4. Looking at your W2 form, list the following:

Taxpayer's Box 1 Wages: _____

Taxpayer's Box 2 FIT: _____

Spouse's Box 1 Wages: _____

Spouse's Box 2 FIT: _____

Step 3 for Retired Clients

Do you receive a pension, annuity, or IRA? Looking at your forms 1099R, list the total distributions.

Box 1 (Distributions): _____

Box 2a (Taxable Amount): _____

Box 4 (Federal W/H): _____

Box 7 (Code): _____

Step 4 for the Self-Employed - A L L Business Types

Please note: **IF** Donna has set you up w/ an assigned payroll from your own corporation, then you need to go back to Step 2. THEN come back here and answer these questions.

List here the total amount of SALES you had this year. The word SALES might mean different things to you and me. I mean how much did you "get". Could be commissions, receipts, billing, proceeds - all those words mean SALES to me. (e.g. a realtor would list commissions received, not sales prices of houses sold.)

*You may have received a form 1099 MISC from your clients. That is the place to start. Add to the 1099's any other sales.

SALES = \$ _____

*List as best you can your expenses that directly relate to your SALES. I just need one number, not the whole list. (e.g. materials, office supplies, cell phone, equip repair, business gifts, etc.)

EXPENSES = \$ _____

*List the amount of miles driven for business **IF** you didn't include the auto expenses in "Expenses."

Biz Miles Driven: _____

Step 5 for All Clients

Did you sell/buy a house? Y or N _____

Was this house a rental property? Y or N _____

Did you sell any stocks? Y or N _____

Purchase Price + Improvements: _____

Sales Price: _____

1. I understand that this is only an extension of TIME to get the paperwork done. It is NOT an extension to pay the tax due.
2. I understand that I have until October 15th to get the paperwork to the IRS.
3. I understand that I need to give the IRS the tax NOW, or penalties and interest will accrue on any balance due.

Taxpayer Signature: _____
Spouse Signature: _____