

## 2023 Extension Request Intake Form Personal OR Corp (Existing clients ONLY)

<b>Office Use Only</b> \$ _____ Request Date: ___/___/2024 By: _____ Extension filed By: _____ Accepted Ext: : ___/___/2024 ___ Spring Hill    ___ Brooksville	<b>Office Use Only</b> _____ _____ _____ _____
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1. Taxpayer Name \_\_\_\_\_ Last 4 SS#XXX-XX-\_\_\_\_\_  
 (First Middle Initial Last)

2. Jt Taxpayer Name \_\_\_\_\_ Last 4 SS#XXX-XX-\_\_\_\_\_  
 (First Middle Initial Last)  
 Corporation Name \_\_\_\_\_ EIN# \_\_\_\_\_ - \_\_\_\_\_

Phone \_\_\_\_\_ Cell \_\_\_\_\_  
 Email \_\_\_\_\_

Filing Status:  Single    Married Joint    Married Separately    Head of Household w/dep Child    Legally Blind/Disabled

Have your dependents changed from last year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>If Yes, list changes below</b>	
Has your address changed?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>If Yes, list new address</b>	

**OR** Business:  S-Corp    C-Corp    Partnership    Trust

Corp/Business Name \_\_\_\_\_ Tax ID# \_\_\_\_\_ - \_\_\_\_\_

Need more time to prepare your federal tax return? This page provides information on how to apply for an extension of time to file. Please be aware that per IRS guidelines:

- An extension of time to file your return does not grant you any extension of time to pay your taxes, **ALL tax payments are still due April 15<sup>th</sup> for personal returns, March 15<sup>th</sup> for corporate (business) returns.** \*\*
- You should estimate and pay any owed taxes by your regular deadline to help avoid possible penalties. You must file your extension request no later than the regular due date of your return.
- Extensions allow you to extend the filing of your return (not payments) until October 15<sup>th</sup> for personal returns, September 15<sup>th</sup> for corporate (business) returns.
- When filing extension, estimate your tax liability on the extension request as any amount due should be paid to IRS by above deadline.

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\*\*All W-2s, 1099s, information on installment sale, seller financed mortgage interest, other wages, profit or loss from business (with all gross receipts and expenses clearly listed), rental income, retirement plan distributions from pensions, annuities, rollovers, IRA, SEP, Keogh, provide all 1099s & any alimony received or any other income, should be provided for an estimate of taxes owed. An updated driver's license for taxpayers is required.

**Signature:** \_\_\_\_\_