



Specializing in Individual, Small Business, Non-Profits, Estate & Trusts

EXTENSION DATA NEEDED FOR NEW CLIENTS

Taxpayer*

Name: _____
 SSN: _____
 Date of Birth: _____
 Primary Phone: _____
 Address: _____

Spouse Information

Name: _____
 SSN: _____
 Date of Birth: _____
 Primary Phone: _____
 Address (if different than taxpayer): _____

Filing Status:

- Single
- Married Filing Separately
- Married Filing Jointly
- Head of Household
- Qualifying Widow(er)

Dependents

Name	SSN	Date of Birth

An extension gives you until October 15, 2025 to file

IT DOES NOT GIVE YOU EXTRA TIME TO PAY TAXES

All tax year 2024 payments made after April 15, 2025 will be charged penalties and interest.

We CAN file an extension for you, but need the following items *before* filing:

- ➔ **Completed and signed Engagement Letter.**
- ➔ **The filing extension fee \$100.**

Once all documentation has been received, returns are completed in the order they are received. If you are on extension, and all information is received by April 15th, we anticipate completion by the END OF JUNE.