

# EXTENSION REQUEST AGREEMENT



E&M Tax Services does not file extensions automatically, to request an extension, we will need the following information and request for **each** individual and entity requesting an extension.

There is a **non-refundable \$100 fee** that is due prior to filing your extension, which will be treated as a deposit towards your 2023 tax preparation fee.

The deadlines to file an extension are as follows:

1. Partnerships and Corporations – **extension request due to E&M by March 1, 2024**
  - Extended tax return is due by September 16, 2024.
2. Individuals – **extension request due to E&M by March 31, 2024**
  - Extended tax return is due by October 15, 2024.

An extension of time to file your return **DOES NOT** grant you an extension of time to pay your taxes. Estimated taxes should be paid by your regular deadline to help avoid penalties.

## **Extension Request Information Needed:**

|                                    |                         |
|------------------------------------|-------------------------|
| <b>Taxpayer OR Entity Name</b>     | _____                   |
| <b>Taxpayer SSN or Entity FEIN</b> | <b>DOB</b>              |
| <b>Spouse Name</b>                 | _____                   |
| <b>Spouse SSN</b>                  | <b>DOB</b>              |
| <b>Current Address</b>             | _____<br>_____<br>_____ |

**E&M will provide an estimated extension payment to avoid penalties, to do so, we will need as much tax information as you have at this time. Below are examples of what we will need to provide an accurate extension payment.**

- All tax documents (W2s, 1099s, 1098s, etc.)
- Any major deductions you will have (Dependents, Sale of Property, Solar, etc.)
- Did you make any Estimated Tax Payments? If so, when, and how much?
- Changes: Married, Divorced, Kids, New House, etc.
- Estimated Income and Expenses of your business.

## **State Extensions:**

States have their own extension procedures, if you have worked in a state other than your resident state listed above. Please list all states you have worked in and how much you made in the respective state.

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Only initial once below

           (Initial Here) I have read the above statement and would like E&M to run a projection of estimated taxes due and provide an extension payment voucher. I have attached/uploaded my tax documents and any related tax changes.

**OR**

No Extension Payments Needed: You would like to File for an Extension without sending tax documents or making a payment to the IRS and state agencies, please initial below:

           (Initial Here) I understand that by filing an extension without payment I may have additional interest and penalties added to my tax liability.

**\*\*Please note\*\*** If you receive a refund, there will be no interest or penalties charged.

***Notes: Please tell us any information you may have that will affect your extension calculations***

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By signing below, you are engaging E&M Tax Services to file your extension. The extension grants you extra time to file your return and does not grant you extra time to pay your taxes. You understand that extension calculations provided by E&M Tax Services are an estimate. E&M Tax Services will provide a full calculation when filing your actual tax return.

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

Date: \_\_\_\_\_