

## EXTENSION REQUEST

An extension to file your tax return is not an extension to pay your taxes.

*Penalties and interest for late payment may accrue and are wholly your responsibility*

**PLEASE PROVIDE A GOOD FAITH ESTIMATE OF THE EXPECTED TAX LIABILITY**

STATES:  CA  NY  NJ  DE  GA  OR  TX  Other \_\_\_\_\_

TAXPAYER NAME			SPOUSE NAME		
SSN			SSN		
Telephone			Telephone		
E-Mail			E-Mail		
Address					
City		State		Zip	

STATUS ON 12/31  SINGLE  HOH  MFJ  MFS  DEPENDENT / Did you move?  Yes  No Date of Move \_\_\_\_\_

W-2s WAGES AND WITHHOLDING (Attach All W-2s)										
Employer's Name	City, State	(T) (S)	Wages	Federal Tax	SS Wages	SS Tax	State Tax	2nd State Tax	City Tax	SDI

1099-INT INTEREST INCOME (Attach 1099-INTs & 1099-OIDs)									
Payer	(T) (S) (J)	Amount	US Savings/Treas.	Tax Exempt	Non-Taxable Fed/Taxable State	Federal Tax	Foreign Tax	Foreign Country	

1099-DIV DIVIDEND INCOME FROM STOCKS, MUTUAL FUNDS, ETC (Attach 1099-DIVs)										
Payer	(T) (S) (J)	Ordinary Div	Qualified Div	Cap Gain Dist	Post May 5	5YR Gain	Non-Tax Dist.	Foreign Tax	Foreign Country	Federal Tax

1099-R RETIREMENT INCOME FROM IRAs/SEP/401(K)/PENSION (Attach 1099-Rs and 5498s)											
Payer	(T) (S)	Gross Distribution	Taxable Amount	Tax Not Det	Total Distribution	Cap Gain Dist	Federal Tax W/H	Employ Contrib/Roth Contrib	IRA/SEP SIMPLE	State Tax W/H	State

**ZACHARY HELLMAN, ENROLLED AGENT**

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ITEMIZED DEDUCTIONS / CREDITS			
1098		CONTRIBUTIONS	
Real Estate Taxes		Total Cash Contributions	
Home Mortgage Interest		Total Non Cash Contributions	

BUSINESS INCOME AND EXPENSES FOR EXTENSION			
<b>1099-MISC/NEC Gross Income from 1099-MISC/NEC and your records</b>			
<b>DO NOT INCLUDE INTEREST INCOME OR W-2 AMOUNTS!</b>			

TAXPAYER		SPOUSE	
Approximate Gross Income		Approximate Gross Income	
Approximate Business Expenses		Approximate Business Expenses	

RENTAL/ROYALTY INCOME AND EXPENSES			
Description	Property A	Property B	Property C
Rental Income			
Total Expenses			

1099BS RECONCILIATION 8949 (Attach 1099-Bs and Broker/Mutual Fund Statements)				
Payer/Broker/Mutual Fund	(T) (S) (J)	Total Proceeds	Total Cost	Federal Tax W/H

ESTIMATED TAX PAYMENTS MADE FOR CURRENT YEAR					
Federal		State _____		State _____	
Q1		Q1		Q1	
Q2		Q2		Q2	
Q3		Q3		Q3	
Q4		Q4		Q4	
Total		Total		Total	

*I certify that I have provided a good faith estimate of my tax liability. I acknowledge that an extension to file my tax return is not an extension to pay my taxes and that all penalties and interest for late payment (including responding to notices) are my responsibility.*

PRINT NAME \_\_\_\_\_ SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

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