

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

Hellman & Associates, LLC

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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				
1099-MISC/NEC Gross Income from 1099-MISC/NEC and your records				
DO NOT INCLUDE INTEREST INCOME OR W-2 AMOUNTS!				
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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