

**\*\*Extension Request Worksheet\*\***  
**Return to Herman & Associates Office ONLY**

Your Name: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

Federal Withholdings on W2s/1099s? No   
 Yes:  You \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_

**FEDERAL**

**STATE (please indicate state \_\_\_\_\_)**

Estimated Payments Made for 2017 No   
 How Much? \$ \_\_\_\_\_ Yes

Estimated Payments Made for 2017 No   
 How Much? \$ \_\_\_\_\_ Yes

Do you expect to owe more than No   
 your current estimated payments? Yes

Do you expect to owe more than No   
 your current estimated payments? Yes:

How Much (approx): \$ \_\_\_\_\_

How Much (approx) \$ \_\_\_\_\_

**Do you want to send a check with the extension?**

(An extension will give you extra time to get your paperwork to the IRS, but it does not extend the time you have to pay any tax due. You will owe interest on any amount not paid by the April deadline, plus a late payment penalty if you have not paid at least 90 percent of your total tax by that date.)

**FEDERAL**

**STATE**

No:   
 Amt \$ \_\_\_\_\_ Yes:

No:   
 Amt \$ \_\_\_\_\_ Yes:

**New Client Info (Please fill in ONLY if you are a NEW CLIENT to our office)**

**First/Last Name:**

Taxpayer: \_\_\_\_\_ Social Security # \_\_\_\_\_ Birthdate \_\_\_/\_\_\_/\_\_\_

Spouse: \_\_\_\_\_ Social Security # \_\_\_\_\_ Birthdate \_\_\_/\_\_\_/\_\_\_

For Herman & Associates Use Only

Extension Filed Efiled  Mailed  Given to Client

Initial/Date Date \_\_\_\_\_ Date \_\_\_\_\_ Date \_\_\_\_\_

**Shannon Begins Process  Lyn sign-in  Preparer Workup**   
**Shannon Finalize Extension**