

****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 2018 No
 How Much? \$ _____ Yes

Estimated Payments Made for 2018 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