

2023 Tax Filing Year  
Due Date: 4/15/2024

### Herman Associates, CPAs PC

Extended Due Date:  
10/15/2024

## Individual Tax Return Extension Request

Extension Requests will be accepted until 4/14/2024 at 2pm

LAST NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

FIRST NAME: \_\_\_\_\_

PHONE: \_\_\_\_\_

SPOUSE NAME: \_\_\_\_\_

EMAIL: \_\_\_\_\_

Compared to last year, I estimate my taxable income to be: (please circle an option and indicate an amount if applicable)	MORE	List: \$ _____
	LESS	List: \$ _____
	SAME	

To accurately prepare an extension on your behalf, we MUST have all your tax documentation for the current year otherwise an estimate will be calculated, not your final tax due.

### Current Tax Year Information

### FEDERAL

### STATE

Withholding on all W2, K1, 1099's for you (& spouse) for the tax year? \$ \_\_\_\_\_ \$ \_\_\_\_\_

Estimated tax payments made towards the current tax year? \$ \_\_\_\_\_ \$ \_\_\_\_\_

**Please check the box next to an option below. If you wish to pay, please indicate the amount.**

I would like to make a payment with my extension in the amount of: \$ \_\_\_\_\_ \$ \_\_\_\_\_

I believe I will owe but am unsure how much and would like assistance calculating the tax due.

Whether I owe or not, I do not want to make a payment with my extension.

### **PLEASE INITIAL IN EACH BOX BELOW THAT YOU HAVE READ AND UNDERSTAND THE STATEMENT.**

	I understand that under both federal and state tax law that the tax due for my tax return is due by the initial due date of the return. The extension is only for additional time to file the paperwork, not additional time to pay the tax. I understand that if I underpay my tax the Internal Revenue Service (IRS) will assess both penalties and interest on the tax due retroactive to the initial due date of the return. Additionally, if I was required to pay estimated tax payments and failed to do so, penalties and interest may also be assessed.
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	I also understand that if I fail to provide all pertinent documentation to Herman & Associates when they assist me in preparing the extension payment the extension payment will be an estimate. Should the estimate fail to cover the full tax due once all documentation is present to calculate the actual tax due, I will be responsible for any additional tax due plus the penalties and interest assessed for failure to pay timely.
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	Finally, <b><u>I understand that my extension payment must be postmarked no later than April 15th, 2024.</u></b> To ensure proper substantiation I should mail my payment certified return receipt and make a copy of all documents included in the envelope. I understand it is not the responsibility of Herman & Associates to verify my payment was made timely and they are not responsible for any penalties or interest for a late tax payment.
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Date: \_\_\_\_\_

Please sign above that you wish Herman & Associates to file an electronic extension on your behalf and, if requested, assist you in preparing a payment voucher to remit with your extension request.

PREPARER: \_\_\_\_\_

ACS #: \_\_\_\_\_

DATE RECEIVED: \_\_\_\_\_