



Building Relationships That Last Generations.

2020 Extension Request

IMPORTANT NOTE : An extension will extend your time to file. It **does not** extend your time to pay. If you owe tax, penalties and interest will begin accruing after April 15, 2021 on the amount you owe.

YOU MUST COMPLETE THE PERSONAL INFORMATION AND AMOUNT PAID SECTIONS OF THIS FORM*. Incomplete forms cannot be filed. It is your responsibility to set an appointment to have your tax return completed before the extended deadline of October 15, 2021.

Personal Information*

- Single /
 Married Filing Joint /
 Married Filing Separate /
 Head of Household /
 Qualifying Widow(er) with dependent child

Taxpayer	
First Name	_____
Last Name	_____
Social Security #	_____

Spouse	
First Name	_____
Last Name	_____
Social Security #	_____

Address:	_____		
City:	_____	State:	_____
Phone:	_____	Zip:	_____
	Alternate Phone:	_____	

Amount Paid*

In order to complete an extension, we must know the total amount of money you have already paid to the IRS through withholding amounts and/or quarterly estimated payments. It is necessary for you to indicate the amounts from all W2's (box 2) and all 1099-R's (box 4) that has been withheld. Add any quarterly estimated payments you sent to the IRS and enter the total amount paid in 2020.

W2 Amounts (box 2)	1099-R Amounts (box 4)	Quarterly Payments (1040-ES)	
_____	_____	_____	_____
_____	_____	_____	_____

Total Amount Paid 2020: \$ _____

Extension with Payment (Forms 4868 and Signature Form 8878)

If you desire to send money with the extension, please complete the following information. The IRS will electronically debit from your account the amount stated on the date requested. An additional form requiring your signature will be generated and sent to you from our office **before** your extension can be electronically transmitted. We will contact you with additional instructions for this process. This part of the application is voluntary.

Withdraw Date: _____ Amount: \$ _____
 Bank Name: _____
 Routing Number: _____
 Account Number: _____ Savings / Checking