



Building Relationships That Last Generations.

2022 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 18, 2023 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, 2023.

Personal Information\*

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

Form with fields for Taxpayer and Spouse: First Name, Last Name, Social Security #

Form with fields for Address, City, State, Zip, Phone, Alternate Phone

- I had an LLC and need a Franchise extension for:
I had income in multiple states and need State extensions for:

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 2022.

Table with 4 columns: W2 Amounts (box 2), 1099-R Amounts (box 4), Quarterly Payments (1040-ES), and an empty column.

Total Amount Paid 2022: \$

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 and only needed if you wish to make a payment with your electronic extension.

Form with fields for Withdraw Date, Amount, Bank Name, Routing Number, Account Number, Savings / Checking