

Personal Extension Information



Sims Tax Solutions

Extension Statement: Filing an extension allows the taxpayer additional time to file, with a deadline of October 15. The Extension allows the taxpayer more time without the IRS assessing a late filing penalty. IT DOES NOT, however, change the fact that, if the taxpayer owes money, interest and late penalties will be assessed. Basically, if you do an extension and find out you owe money after return is complete, interest from April to October will be placed on original amount owed to IRS. Taxpayers may file an extension, as well as make a payment to the IRS. To avoid the late payment penalty, a payment can be made to the IRS for 90% of the total tax that was due.

Fee for Extensions: New Clients - \$49 / Existing Clients - \$0

Fees Paid:	Date Filed:	Tax Year:
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☐ Married – Filing Jointly ☐ Married – Filing Separately ☐ Single ☐ H-O-H ☐ Non-Resident

Existing Client

Primary Name: _____ Preparer: _____

Phone Number: _____ Email: _____

Street Address: _____ SSN: _____

Notes: _____

New Client

Primary Name: _____ Assigned: _____

Phone Number: _____ SSN/ITIN: _____

Email: _____ DOB: _____

Street Address: _____

Spouse Name (if applicable): _____ DOB: _____

Phone Number: _____ SSN/ITIN: _____

Notes: _____ Email: _____