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TAX FILING EXTENSIONS

TAX RETURN FILING IS DUE APRIL 15th, 2024 FOR THE 2023 TAX YEAR.

NOTE: You have received this extension if you are in our office in any capacity:

- Taxes are ready for pick up.
- Taxes are on hold awaiting more data from you.
- Taxes are in process but incomplete - logistically we may not be able to get taxes to you by the deadline.

IMPORTANT – this is for personal tax only, not LLC, partnership or corporation

On the Federal (IRS) tax extension Form 4868, line number **6**

1) could be -0- (zero) - - Use the federal withholding on your forms W-2 (box number 2) for lines 4 and 5

OR

2) if there is a tax liability owing on line 6 or you believe you will owe tax, it is in your best interest to send a payment with the extension. Place your social security number and “2023 income tax” on your check. Also, complete line 7 in this case. ***You must let us know if you sent a payment with the extension BEFORE we complete your tax return.***

Note 1: IGNORE THE ZEROES pre-printed on the extension form. You MUST replace them with real numbers. Extension likely won't be granted if zeroes are left on the form.

Note 2: If your tax returns are not yet completed, we do not know if you owe tax.

DIRECTIONS

Complete part I of the form with name(s), address and social security number(s) and complete Part II (see above).

Make a copy of the completed form before mailing. The copy is for your records.

Form 4868 is for the IRS. Mail to:

With Payment: **IRS Center, P.O. Box 802503, Cincinnati, OH 45280-2503**

Without payment: **IRS Center, Ogden, UT 84201-0045**

Form 3519 is an extension for California state taxes, but is filed only if you owe and are paying state taxes. Put your Social Security number and “2022 form 540” on the check. Complete the line indicating the amount of payment you are sending and mail to:

Franchise Tax Board, PO Box 942867, Sacramento, California 94267-0008.

RESULTS

Form 4868 gives you an extension to October 15th to file your return.

State extension is automatic and paperless unless you owe.

SPECIAL NOTE Our office will be closed in May. If you plan to have us prepare your tax returns, please have your information to us by September 15th at the very latest, to meet the October 15th deadline. Otherwise, we cannot promise to complete your tax returns timely.

Corporations & LLC's on extension are due September 15, information must be to us by August 15th.