

2023 PERSONAL EXTENSION REQUEST

Returning Client _____

New Client _____

Marital Status (Choose One):

Single _____ Married Filing Joint _____ Married Filing Separate _____ or Head of Household _____

Primary Taxpayer _____ SS# _____

Secondary Taxpayer _____ SS# _____

Address: _____

Phone: _____ Email: _____

***If you anticipate a refund:**

Please list the total federal withholdings on your W-2's & 1099's \$ _____

***If you anticipate having a balance due:**

Do you want to send a payment with your extension? Yes _____ No _____

If yes, how much? Federal \$ _____

(Please be aware that interest & penalties are assessed on any unpaid balance after April 15th until the balance is paid.)

***States I wish to extend:** _____

Do you wish to send a payment to a state(s) with your extension? Yes _____ No _____

If yes, how much and to which state? State _____ \$ _____

Extension Engagement Letter with Norma's Tax Service For Filing Federal and State Personal Tax Extensions

Thank you for choosing Norma's Tax Service to assist you in filing your 2023 personal tax extension to the federal and state governments. This letter confirms the terms for engaging with you to e-file these extensions.

The 2023 personal income tax returns are due **Monday, April 15, 2024**. By filing an extension, you are requesting an additional six months to file your 2023 federal and state(s) tax returns. The deadline for filing your tax return after it has been extended is **Tuesday, October 15, 2024**.

This is an extension to **delay filing the federal and state tax returns for tax year 2023 only**. This is **NOT** an extension to **delay paying any amount owed**. Interest and penalties are assessed for any balance due that is not paid by the original due date of April 15, 2024.

Because we have not prepared your taxes yet, you alone will be responsible for determining whether you owe taxes or are entitled to a tax refund. The IRS will hold you accountable for the calculations provided with this extension. If you underestimate the balance due and pay less now than the end result, you will be charged interest and an underpayment penalty on the remaining balance beginning April 15, 2024. If you overestimate the tax liability, you will receive the refund after your return is completed and filed.

Our engagement to prepare your 2023 tax extensions will conclude with the submittal of your electronically filed federal and state(s) tax extension. We can also print vouchers for you to send any payment to the IRS to pay your balance due.

Your signature will affirm that this letter correctly summarizes your understanding of the arrangement for this work, please sign this letter in the space indicated below.

Sincerely,

The staff of Norma's Tax Service

By signing below, I hereby authorize Norma's Tax Service to electronically file an application for an "Automatic Extension of Time to File a United States Individual Income Tax Return" for my federal and state(s) 2023 taxes.

Signature

Date