
PERSONAL AND BUSINESS TAX EXTENSION TIPS

Below is a list of pointers and helpful tips to complete the Tax Extension Request. We encourage you to read over these tips. If you have any additional questions, please contact our office. We look forward to processing your returns for you this year.

- The business name needs to read the same way it reads on your official registration documents or IRS letters. If this information is incorrect, the IRS will reject the extension until it is corrected. The EIN being correctly entered is one of the most important parts of filling out this form. Please make sure it is accurate. The EIN is the number that is required to file a business tax return.
- Start Date of the Business refers to the date the LLC was established. This date can be found on the Articles of Organization, SS-4 Form, or IRS Letters.
- Under the Type of Entity Question: An LLC and Corporation are not the same. A Corporation ends with the following: Inc, Incorporated, Corp, or Corporation. If you have a Corporation, the filing deadline is April 15th. If you have an S-Corp, the filing deadline is March 15th. If you have questions in regard to your Corporation being an S-Corp, please view the IRS letter with the EIN. If the letter states you must file an 1120-S, you are considered an S-Corp. If it states you must file an 1120, you are a Corporation (C-Corp).

A single member LLC means there's only one person that is a member of the business. The deadline for single member LLCs is April 15th.

A multi member LLC has two persons that are involved. A husband and wife are considered a multi member LLC if both parties are involved. A multi member LLC has a deadline of March 15th.

After these dates the extensions can no longer be granted.

- If you are a returning client, select SALY (Same as Last Year) and you will not need to fill in the remaining information.
- Once we have filed the extension for you, the due dates are as follows:

September 15th- Multi Member LLCs and S-Corps

October 15th- Personal Returns, Single Member LLCs and C-Corps.

PERSONAL AND BUSINESS EXTENSION REQUEST

PERSONAL INFORMATION

First Name: _____ Initial: _____ Last Name: _____

Address: _____

City: _____ State: _____ Zip: _____ Country: _____

Filing Status: Married Filing Joint Married Filing Separate Single

SSN: _____

Please indicate: Spouse / Business Partner

First Name: _____ Initial: _____ Last Name: _____

Address: _____

City: _____ State: _____ Zip: _____ Country: _____

Filing Status: Married Filing Joint Married Filing Separate Single

SSN: _____

Please indicate: Spouse / Business Partner

First Name: _____ Initial: _____ Last Name: _____

Address: _____

City: _____ State: _____ Zip: _____ Country: _____

Filing Status: Married Filing Joint Married Filing Separate Single

SSN: _____

Business Name: _____ Start Date of the Business: _____

Business Address: _____

City: _____ State: _____ Zip: _____ Country: _____

Employer Identification Number (EIN): _____

Type of Entity: Corporation S-Corporation Single Member LLC Multi-Member LLC Sole Proprietor

(Note: if this is your first year and you are a S-Corp, please attach your filed form 2553. If you have not filed a 2553, you are not considered a S-Corp. If you do not know your entity type, please attach the IRS EIN Letter)

Do you anticipate or do you normally owe on your personal taxes? Y or N

If the request is made after the due date, the IRS will not grant an extension.