



2009 EXTENSION REQUEST FORM

Would you like us to prepare an extension for your 2009 Tax Return? If yes, please use the four easy steps below to help us in preparing your extension for you.

Name _____

Step 1: Estimate your tax liability

I expect my 2009 tax liability to be:

- About the same as 2008
- Greater than 2008...by _____ (indicate whether your estimate is \$ or %)
- Less than 2008...by _____ (indicate whether your estimate is \$ or %)
- Use the last 2009 tax projection you prepared for me
- Please prepare a draft of my return to determine a more accurate estimate.
If you choose this option, please fax or email the following information to our office:

- All W-2's received from employers
- All 1099's received from investment companies
- Estimated business income and expenses
- Any K-1's you have received
- List any changes in deductions (i.e. property tax, mortgage interest, charitable contributions, medical expenses, unreimbursed business expenses, etc.)
- List any estimated tax payments made for 2009

Step 2: Determine your 2009 tax payments

What was your federal income tax withholding on W-2's (please include copies)? _____

How much did you make in estimated tax payments, if any? _____

Step 3: Tell us when you would like us to prepare your actual 2009 return:

Please complete my return by...

- May 31st. I will provide you with my information by May 1st.
- June 30th. I will provide you with my information by June 1st.
- July 31st. I will provide you with my information by July 1st.
- Aug. 31st. I will provide you with my information by Aug. 1st.
- Sep. 30th. I will provide you with my information by Sep. 1st.

Step 4: Fax or email this form to our office.

Once we have received your Extension Request, we will contact you with the amount to send in with your extension, and coordinate the filing of the extension with you.