

2016 TAX EXTENSION REQUEST

As of December 31, 2016 your marital status was: (check only one status):				
<input type="checkbox"/> Single	<input type="checkbox"/> Married Filing Jointly	<input type="checkbox"/> Married Filing Separately	<input type="checkbox"/> Head of Household	<input type="checkbox"/> Widow(er)
Name as it appears on your social security card:				
Taxpayer first name	M.I.	Last Name	Social Security Number	
Spouse's first name	M.I.	Last Name	Social Security Number	
Address	Apt #	City	State	Zip Code / Postal Code
Province or County:		Foreign Country:		
Phone:		Email:		
Date of Birth:	U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	Green card? <input type="checkbox"/> Yes <input type="checkbox"/> No	Visa type: _____	Occupation:
Spouse Date of Birth:	U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	Green card? <input type="checkbox"/> Yes <input type="checkbox"/> No	Visa type: _____	Occupation:

STATE EXTENSIONS THAT MUST BE FILED:	LIST STATES BELOW:
Resident State(s) – states you lived in during 2016	
Non-Resident State(s) – states where you worked during 2016	
Other State(s) to file --i.e., rental property, etc.	

SELF-EMPLOYED TAXPAYERS:	INDICATE BELOW:
NYC Unincorporated Business Extension	Circle one: YES NO

IRS / STATE PAYMENTS YOU ARE MAKING WITH EXTENSION:	
\$ _____ - Federal	Make your payment at www.irs.gov
\$ _____ - NY	Make your payment at www.tax.ny.gov
\$ _____ - Other State: _____	Make your payment at the state's website

You are responsible for taxes, interest and penalties for failure to pay tax due with extension. The extension allows you additional time to file; it does not provide for additional time to pay. All tax is due by April 15th.

GUIDELINE: To avoid penalty, when taxable income is same or greater than last year: 1) if your Adjusted Gross Income is \$150,000 or less, estimated payments must be 100% of prior year's tax; 2) if your Adjusted Gross Income is over \$150,000, payments must be 110% of prior year's tax. Based on prior year TOTAL tax.

NO EXTENSIONS WILL BE FILED WITHOUT A DEPOSIT
Tax Preparation Deposit Required: **\$250.00**

Client Signature: _____ Date: _____



CHOICE TAX SOLUTIONS INC. Admitted to Practice before the IRS

CLIENT NAME: _____ DATE: _____

For Professional Services Rendered:

Retainer for 2016 Federal & State Income Tax Preparation \$250.00
(includes Federal & State Extensions)

NO EXTENSIONS WILL BE FILED WITHOUT A DEPOSIT
Deposit Required: \$250.00

Please complete with your credit card information. Or if you prefer, you can make a secure payment at our website: www.choice-tax.com under **Pay My Fee**.

American Express Visa MasterCard Discover PayPal @ our website

CARD NUMBER

EXP

CARDHOLDER NAME

ADDRESS ASSOCIATED WITH CARD

 SIGNATURE (REQUIRED)

DATE

NOTE: As per our Office Policy and noted in all Engagement Disclosure letters, retainers are non-refundable and deemed earned upon receipt.

If, after a payment via credit card, you later dispute the charges, unless prohibited by law, you agree not to cancel, revoke, charge back, or dispute any previously entered charge on your credit card. If you do so, and it is later determined that the charge was properly authorized, you agree to pay all out-of-pocket fees and costs incurred by Choice Tax Solutions Inc. as a result of the improper cancellation, revocation, charge back or dispute.