

Extension Request

2 0

FOR INTERNAL USE ONLY – DO NOT WRITE IN THIS SPACE

STATES:	NY		NJ		CT		CA		MA	
	ME		OR		CO					
NYC-UBT:			MTA:							

CHECK BOXES THAT APPLY

	DATE EFILED	A / R	DATE ACCEPTED / REJECTED	INITIALS	DATE MAILED
FED					
NY					
UBT					

TAXPAYER'S (T) NAME						SPOUSE'S (S) NAME					
(T) TAXPAYER'S SOCIAL SECURITY NO.						(S) SPOUSE'S SOCIAL SECURITY NUMBER					
(T) BUS. TEL			(T) CELL			(S) BUS. TEL			(S) CELL		
(T) EMAIL						(S) EMAIL					
CURRENT ADDRESS						CITY		STATE		ZIP	
HOME PHONE						FAX: <input type="checkbox"/> X if call before faxing					

STATUS ON 12/31: SINGLE HEAD OF HOUSEHOLD MARRIED FILING JOINTLY MARRIED FILING SEPARATELY DEPENDENT

IN WHAT COUNTY (NOT COUNTRY) _____

DO YOU LIVE? _____

SCHOOL DISTRICT / MUNICIPALITY: _____

DID YOU MOVE? YES NO **IF YES, DATE MOVED** _____

OLD ADDRESS: _____

CITY _____ **COUNTY** _____ **STATE** _____

7 W-2s WAGES AND WITHHOLDING (Attach All W-2s)											FREELANCE INCOME → SHEET #3		
Employer's Name	City, State Employed	(T) (S)	Wages BOX #1	Federal Tax BOX #2	SS Wages BOX #3	SS Tax BOX #4	State Tax BOX #17	2nd State Tax BOX #17	City Tax BOX #19	NY&NJ SDI BOX #14	NJ UI CASDI BOX #14	X IN #13	

8 1099-INT INTEREST INCOME (Attach 1099-INTs + 1099-OIDs)										FREELANCE INCOME → SHEET #3		
Payer	(T) (S) (J)	Amount BOX #1	US Savings/Treas. BOX #3	Tax Exempt BOX #8	Non-Taxable Fed. Taxable State LEAVE BLANK	Federal Tax BOX #4	Foreign Tax BOX #6	Foreign Country BOX #7				

9 1099-DIV DIVIDEND INCOME FROM STOCKS, MUTUAL FUNDS, ETC. (Attach 1099-DIVs)											ENTER 1099-Bs → SHEET #5		
Payer	(T) (S) (J)	ORDINARY DIV. BOX #1A	QUALIFIED DIV. BOX #1B	CAP GAIN DIST. BOX #2A	POST MAY 5 BOX #2B	5 YR GAIN BOX #2C	NON-TAX DIST. BOX #3	FOREIGN TAX BOX #6	FOR. COUNTRY BOX #7	FEDERAL TAX			

15/16 1099-R RETIREMENT INCOME FROM IRAs / SEP / 401(K) / PENSION (Attach 1099-Rs and 5498s)											ENTER 1099-Bs → SHEET #5		
Payer	(T) (S)	GROSS DISTRIBUTION BOX #1	TAXABLE AMOUNT BOX #2A	TAX NOT DET #2B	TOTAL DIS-TRIB #2B	CAP GAIN DIST. BOX #3	FEDERAL TAX W/H BOX #4	EMPLOY CONTRIB ROTH CONTRIB BOX #5	IRA / SEP SIMPLE <input checked="" type="checkbox"/>	STATE TAX W/H BOX #10	STATE OF BOX #11		

Itemized Deductions / Credits

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1098 Real Estate Taxes (1098 line 4)		Total Cash Contributions	
1098 Home Mortgage Interest (1098 line 1)		Total Non Cash Contributions (Clothing/Furniture etc.)	
Unreimbursed Employee Business Expenses			

Business Income and Expenses for Extension

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TAXPAYER:		SPOUSE:	
<input type="checkbox"/> NYC-UBT	<input type="checkbox"/> MTA	<input type="checkbox"/> NYC-UBT	<input type="checkbox"/> MTA
GROSS INCOME FROM 1099-MISCS AND YOUR RECORDS		GROSS INCOME FROM 1099-MISCS AND YOUR RECORDS	
DO NOT INCLUDE INTEREST INCOME OR W-2 AMOUNTS!	AMT RECVD BY 12/31	DO NOT INCLUDE INTEREST INCOME OR W-2 AMOUNTS!	AMT RECVD BY 12/31
Approximate Gross Income		Approximate Gross Income	
APPROXIMATE BUSINESS EXPENSES		APPROXIMATE BUSINESS EXPENSES	
Approximate Business Expenses Total		Approximate Business Expenses Total	

AN EXTENSION TO FILE IS NOT AN EXTENSION TO PAY!

The IRS and most states require that you pay your taxes with your extension. If you do not pay at least 90% of the taxes owed with your extension form, the IRS and most states **not New Jersey**, nevertheless, will grant you an extension. However, you must make a reasonable estimate of your tax liability. If you do not pay you will be subject to **1/2 % PER MONTH LATE PAYMENT PENALTY** (6% per year) plus 8% interest, therefore you will be paying 14% on your late payments.

ESTIMATED TAX PAYMENTS MADE FOR CURRENT YEAR

62 Federal			75 State of:			24 NYC UBT			NYS MTA TAX		
QTR	DATES PAID	AMOUNT	QTR	DATES PAID	AMOUNT	QTR	DATES PAID	AMOUNT	QTR	DATES PAID	AMOUNT
last year's overpayment applied to this year's est. tax			last year's overpayment applied to this year's est. tax			last year's overpayment applied to this year's est. tax			last year's overpayment applied to this year's est. tax		
1st			1st			1st			1st		
2nd			2nd			2nd			2nd		
3rd			3rd			3rd			3rd		
4th			4th			4th			4th		
Total			Total			Total			Total		
10 Last Year's Itemized 12:		(LEAVE BLANK)	62 Last Year's Tax Liability 14:		(LEAVE BLANK)	23 Last Year's Tax Liability		(LEAVE BLANK)	3 Last Year's Tax Liability		
63 Last Year's Tax Liability 8:		(LEAVE BLANK)	73 This Year's: Paid with Extension:			24 Paid with Ext:			8 Paid with Ext:		
Last Year's AGI:		(LEAVE BLANK)									
69 This Year's: Paid with Extension:											
71 Credit for Prior Year's Min. Tax:											