

## Individual Tax Return EXTENSION request.

**Complete and return** this form to PM CPAs **by February 29, 2016**

to receive a **FREE** extension filing (a \$55 value).

To file your extension, we need the following information. This will take you **less than 10 minutes** to complete. You have or will receive these documents soon. Please complete the shaded boxes and send us this form. We will notify you by email if any tax payments are due with the extension on April 18.

Your Name:  Phone #:

1) Compared to 2014, do you think your **2015 TOTAL**

INCOME	DEDUCTIONS	(check one box in <b>each</b> column)
<input style="width: 50px; height: 20px;" type="checkbox"/>	<input style="width: 50px; height: 20px;" type="checkbox"/>	went <b>UP</b> by more than 10%
<input style="width: 50px; height: 20px;" type="checkbox"/>	<input style="width: 50px; height: 20px;" type="checkbox"/>	stayed relatively the <b>SAME</b>
<input style="width: 50px; height: 20px;" type="checkbox"/>	<input style="width: 50px; height: 20px;" type="checkbox"/>	went <b>DOWN</b> by more than 10%

2) We need the amount of income taxes withheld and/or paid by quarterly estimates. You may **fax, mail** or **hand deliver** to us the originals or copies of these forms, OR complete the table below instead.

Do **NOT email** us the **tax documents** because your SSN, name and address appear on the forms.

Form W-2	Wages	#1	#2	#3	#4	#5	Totals
Taxable Wages	<b>Box 1</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0
Federal tax withheld	<b>Box 2</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0
State tax withheld	<b>Box 17</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0

Form 1099-R	IRA, Retirement & Annuities	#1	#2	#3	#4	#5	Totals
Gross distribution	<b>Box 1</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0
Taxable distribution	<b>Box 2a</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0
Federal tax withheld	<b>Box 4</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0
State tax withheld	<b>Box 12</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0

Form SSA-1099	Social Security Benefits	#1	#2	Totals
Taxable distribution	<b>Box 5</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0
Federal tax withheld	<b>Box 6</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0

Form 1099-MISC	(only list tax withheld, if any)	#1	#2	#3	#4	#5	Totals
Federal tax withheld	<b>Box 4</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0
State tax withheld	<b>Box 16</b>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	<input style="width: 80px; height: 20px;" type="text"/>	\$ 0

### QTRLY Estimated Tax for 2015

Total Federal payments	<input style="width: 80px; height: 20px;" type="text"/>	}	Only include tax applicable to the year 2015. Do <b>not</b> include tax paid with your <b>2014</b> return, if any.
Total State payments	<input style="width: 80px; height: 20px;" type="text"/>		

### Summary

Taxable Income	\$	0	\$	0	\$	0	\$	0	\$	0	<b>\$ 0</b>
Total Federal Tax paid	\$	0	\$	0	\$	0	\$	0	\$	0	<b>\$ 0</b>
Total State Tax paid	\$	0	\$	0	\$	0	\$	0	\$	0	<b>\$ 0</b>

**Comment / Question -**