

Client Name: _____ Contact: _____

Date of Contact: _____ Method of Contact: Email Phone In Person

Effective today, we cannot guarantee that your return can be completed by the 15th. We will extend your return at no cost and will work on it in the order received. I can schedule a time for you to drop off your tax information after April 18th. **To avoid penalties**, you must have paid in or withheld a certain amount for federal and state. This is called a safe harbor. For a tax preparer to calculate this for you, you will need to send or call us with the amount of federal and state taxes withheld or paid no later than April 9th at 4 p.m. Look at your 2015

- W-2s
- 1099-Rs
- Social Security and
- Estimated Tax Payments

If we determine that you need to send in a payment, a tax preparer will contact you by April 13th. Extensions need to be submitted by April 18th.

Do you want us to extend your return? Yes No (If yes, update AWS extension requested . If no, place in folder.

Do you want us to calculate the safe harbor payments? Yes No If yes, we must receive information by 4/9/2016.

For Preparer Use:

Document	Federal Withholding	State Withholding
W-2s		
1099-Rs		
Social Security		
Estimated Payments		
Total Paid & Withheld		
Total AGI from 2014 return		
Tax Liability from 2014 return		
Total Due with the Extension [] 100% or [] 110% of 2014 if [] > \$150,000 or \$75,000 MFS		

Date of Contact: _____ Person Contacted: _____ Extension Done: _____

Action to be taken: _____

Effective today, we cannot guarantee that your return can be completed by the 15th. We will extend your return at no cost and will work on it in the order received. To avoid penalties, you must have paid in or withheld:

- 90% of the tax shown on the 2015 return or
- 100% of the tax on the 2014 or 110% of the tax on the 2014 return if your 2014 AGI was over \$150,000 (MFJ) or \$75,000 (MFS)

Underpayment penalty does not apply if the tax balance due is less than \$1,000 or the taxpayer had no liability on the 2014 tax return.