Pamela Price EA Inc.

Pamela Price EA & Associates

Enrolled to practice before the Internal Revenue Service

EXTENSION QUESTIONNAIRE

Be aware: **an extension is for time to file, not time to pay!**

If you owe, payment should be sent with your extension to avoid interest & half a percent a month, or part thereof, on the unpaid balance for not paying on time.

Check **ONLY ONE** of the following options:

___ I do not believe I owe and wish you to show "No balance due" on my extension.

___ I think I do or may owe, but do not wish to send any money at this time.

___ I **do** wish to send payment for this amount: $ _____

I understand that time restraints make it impossible for you to advise me as to how much I should send. Some options might be:

1. To send what I owed in the prior year. Often the prior year is a good guide.
2. If I pay estimates, I might send at least a quarter of the prior year's estimates with the extension to hopefully cover my first estimate and to serve as a buffer.
3. I might just send what I am comfortable with sending right now.

To file your extension, we need (*ideally*) **all your income,** but especially your W-2s and other items that had withholding, since your total withholding goes on the extension.

Furthermore, we need to know
if you paid estimates & how much:

FEDERAL: _____

STATE: _____

_____ _____
SIGNATURE **DATE**

_____ _____
PRINT NAME **PHONE NUMBER**

_____
EMAIL ADDRESS

Please return this form via your client portal, email, or fax. Thank you!

Send the rest of your documents ASAP so you can go right in the queue to get your return done.

4525 Ambrose Avenue, Los Angeles, California 90027
Phone (323) 663-5727 Fax (323) 661-2770
Email: pam@pamelapriceea.com Website: pamelapriceea.com