

Extension Agreement

Firm Name: Pel & Associates

It is understood that by signing below, you are granting this firm permission to file a six-month extension for your 2022 tax return. It is your responsibility to ensure that an extension is timely filed by April 18, 2023, and Pel & Associates is not liable for any penalties or interest that the Internal Revenue Service (IRS) or state agency may impose due to late filing. With a timely filed Form 4868, you will be granted an extension to file your 2022 tax return until October 16, 2023. **Please keep in mind that this is an extension to file, not an extension to pay.** The IRS or state agency may apply interest to any tax liability that is not paid by April 18, 2023.

If you wish to send in a payment with the extension, please indicate the amount you would like to send in below. Pel & Associates will electronically file an extension; however, **it is your responsibility to make tax payments no later than April 18, 2023. Payments may be made electronically, or an extension voucher will be provided to you.**

Once the extension has been filed by our firm, a copy of the extension and the signed Extension Agreement will be sent to you for your records as proof of filing.

This firm charges a \$25 non-refundable deposit to file an extension that will be applied toward your final tax preparation bill once your tax return has been completed. Your extension will not be electronically filed until we have received your \$25 non-refundable deposit and this signed agreement. You can fax this completed agreement to our office at 866-279-4916 or e-mail it to admin@pelandassociates.com. The \$25 non-refundable deposit may be paid through our website at www.pelandassociates.com by clicking on "Make a Payment."

Should you have any questions or concerns regarding filing an extension, feel free to contact our office at 714-526-2668.

****Remember, the Extension is an extension to file, not an extension to pay. If you are not sure whether you will need to make any payments by April 18, 2023, please see the reverse side and answer the questionnaire and return to our office as soon as possible.**

If you anticipate having a tax liability, please indicate below:

_____ **Yes, I will make a tax payment with my 2022 Extension as follows:**

Federal _____ State _____

_____ **YES, please provide vouchers for me (if you are unsure of what to pay, fill out worksheet on reverse).**

_____ **NO, vouchers are not requested (you do not need to fill out worksheet on reverse).**

(Please note: payment may also be made online at www.irs.gov or www.ftb.ca.gov for California returns. Please contact the office for other state options if needed.)

_____ **No, I will not be making a tax payment with my 2022 Extension.**

Agreed:

Taxpayer Signature

Date

Spouse Signature

Date

Taxpayer Name (Please Print)

Spouse Name (Please Print)

2022 Tax Extension Payment Calculation Worksheet

If you would like to have our office calculate your payment needed with your extension, please answer the following questions and return this form, signed with your \$25 deposit, as soon as possible. The extension payment is due to the IRS and your state by April 18, 2023.

If you are new client, please provide a copy of your 2021 Tax Return.

Was your 2022 Income similar to your 2021 Income? YES NO

If NO, please indicate what changed:

What Changed?	Amount:
_____ Increased/Decreased by:	\$ _____
_____ Increased/Decreased by:	\$ _____
_____ Increased/Decreased by:	\$ _____
_____ Increased/Decreased by:	\$ _____

Notes:

Please indicate your payments made so far towards your 2022 tax liability:

<p>Federal: W-2 Withholding: \$ _____</p>	<p>State: _____ W-2 Withholding: \$ _____</p>
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Federal Estimated Payments:

State Estimated Payments:

DATE	AMOUNT	DATE	AMOUNT