



“We Don’t Just Do Taxes...WE KNOW TAXES”

EXTENSION LIST (Tax Season 2024)

- ▶ Our company will begin offering **FREE** Extensions to clients from April 1, 2025 through April 15, 2025.
- ▶ The tax filing deadline for Tax Season 2024 is Tuesday, April 15, 2025.
- ▶ An Extension allows taxpayers a 6 month extension until Wednesday, October 15, 2025 to file their 2024 Tax Return.
- ▶ We will prepare and submit a **FREE** Extension for taxpayers who allow us to prepare their 2024 Tax Return once they are ready to file.
- ▶ To file an Extension, taxpayers must prepay our Tax Preparation Fee for their 2024 Tax Return or prepay a minimum fee of \$299.99 with the agreement to pay the remaining balance, if applicable, of the Tax Preparation Fee once they are ready to file their 2024 Tax Return.
- ▶ Taxpayers can prepay their Tax Preparation Fee inside the office using our acceptable payment options, or they can pre-pay via telephone using a credit or debit card.
- ▶ We must have a copy of the taxpayer and spouse’s (if married filing jointly) photo identification (driver’s license, military, passport, or state issued) before we can accept any prepayment of the Tax Preparation Fee.
- ▶ Taxpayers can avoid prepaying us for their 2024 Tax Return by preparing their own **FREE** Extension on our website by clicking on the link, “File Your Taxes Online.”
- ▶ Place a copy of the taxpayer’s photo identification(s) and a copy of the prepayment in an office copy folder, and place it in the hold drawer at the receptionist desk.
- ▶ Upon receiving all necessary items, print the taxpayer’s name(s), contact phone number(s), and print your name on Page 2 of the Extension List.
- ▶ Inform taxpayers that we will contact them via telephone on or before Tuesday, April 15, 2025 by 7:00 p.m. to prepare their **FREE** Extension, and if they do not receive a telephone call by that time, they should call the office.
- ▶ **DO NOT** place taxpayer’s name(s) and contact phone number(s) on Page 2 of the Extension List until all taxpayer’s photo identification(s) and the prepayment of the Tax Preparation Fee have been received.



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