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| 2775 W US-22 Suite 3Maineville, OH 45039(513) 900-9513<https://heritageincometax.com>  |  |

**Extensions to File 2020 Taxes**

Every year, millions of taxpayers request an automatic extension to file their tax return(s). There are several excellent reasons to request an extension to include: 1) allow for additional time to retrieve documents and organize expenses, 2) mitigate the “rush” that can lead to an inaccurate or incomplete tax return, 3) reduce the possibility of having to amend a return due to inaccuracies, and 4) allow time to seek professional advice for complex tax issues.

An automatic extension allows a taxpayer six additional months to file their tax return, without penalty. However, the taxpayer must still pay any tax due by the original deadline. Many taxpayers estimate “tax due” by referring to their prior-year tax forms. If the taxpayer inadvertently pays more than the actual amount due, then the IRS will return the excess payment after the tax return is filed.

Although the IRS does not publish data on the subject, we have no reason to believe that an extension increases your chances for an Audit. In the unlikely event you are audited, we believe a complete and accurate tax return is more important than rushing to meet the traditional tax deadline of April 15th.

Our office charges $50 to electronically file your extension. The $50 is applied to your bill when we complete and file your tax return. Thank you for the opportunity to be of service. If you have any questions, contact our office at (513) 900-9513.

Sincerely,

Heritage Income Tax Services

Taxpayer Data

Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Telephone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SSN and Date of Birth:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse SSN and Date of Birth \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I have reviewed this form as to accuracy and desire that Heritage Income Tax file for my 2020 tax extension.

Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tax Payment

Amount you will pay with extension:

 Federal: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 State(s):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 State(s):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Would you like to submit this payment when we e-filing your extension? \_\_\_\_\_\_\_ or Mail a check? \_\_\_\_\_\_\_

If you would like to pay your tax with direct debit, provide:

Bank:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PRINT CLEARLY BELOW**

Account #:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Routing #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Note, we will set payments for 14 April 2021).