



---

## Tax Extension Information Intake Form

Page 1

### Client Information

---

Primary Taxpayer Name (Legal)

Spouse Name (if joint)

Phone

Email

Mailing Address (Street, City, State, ZIP)

### Taxpayer Type

---

Individual

Business

Both Individual & Business

### Filing Preferences

---

Federal extension requested

State extension requested

State(s) (if applicable)



---

## Tax Extension Information Intake Form

Page 2

### Notes / Special Circumstances

---



---

## Individual Tax Extension (IRS Form 4868)

Page 3

### Individual Extension Details

Social Security Number (SSN)

Spouse SSN (if joint)

---

### Filing Status

Single

Married Filing Joint

Married Filing Separate

Head of Household

Qualifying Surviving Spouse

---

### Estimated Tax Information

Estimated Total Tax Liability for the Year

Federal Income Tax Withheld

Estimated Payments Already Made

Payment to Submit With Extension



---

## Individual Tax Extension (IRS Form 4868)

Page 4

Notes / Special Circumstances

---



---

## Business Tax Extension (IRS Form 7004 and other entities)

Page 5

### Business Extension Details

---

Business Legal Name

DBA (if applicable)

EIN

Business Address (Street, City, State, ZIP)

### Entity Type

---

Sole Prop (Sch C)

Single-Member LLC

Partnership/MM LLC

S-Corporation

C-Corporation

Trust/Estate

Nonprofit

### Estimated Business Tax Information

---

Estimated Total Tax Liability

Estimated Payments Already Made

Payment to Submit With Extension (if any)

State(s) to extend



---

## **Business Tax Extension (IRS Form 7004 and other entities)**

Page 6

**Notes / Special Circumstances**

---



---

## Authorization, Disclosure, and Electronic Signature

Page 7

### Electronic Signature Consent

---

By typing my name below, I agree that my typed signature is the legal equivalent of my handwritten signature.

I authorize BPX Tax Prep & Tax Planning to prepare and electronically file the applicable Federal and State tax extension(s).

Taxpayer Typed Electronic Signature

Date

Spouse Typed Electronic Signature (if applicable)

Date



---

## Internal Use – Tax Preparer Copy

Page 8

### Internal Processing

Prepared By

Date Filed

Confirmation # (Federal)

Confirmation # (State)

### Internal Notes

---

Save

Print