



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](#)