

REQUEST FOR TAX EXTENSION - DUE MARCH 2

After March 2 Extensions will be filed without Calculations



Date: _____

IF YOU THINK YOU WILL BE OWING, Email (frontdesk@winthco.com) ASAP!

Complete this form and **UPLOAD TO THE PORTAL** with the **Tax Form** Listed Below.

Send To Your Winthco Portal: winthco.clientportal.com or FAX: 805-329-5827

--- Your Email to us, IF YOU THINK YOU OWE, is Critical! ---

From: _____ Cell: _____ Email: _____

ALL DOCUMENTS MUST BE SENT TO THE SECURE PORTAL OR FAXED--Do Not Email Tax Documents

W-2 Wage Earners

Name: _____

Social Security (Last 4 Digits): _____ # of W-2's _____

Name: _____

Social Security (Last 4 Digits): _____ # of W-2's _____

Were your ITEMIZED DEDUCTIONS the SAME as Last Year? _____ Changes: _____

URGENT: IF YOU RECEIVED A Code V Option Sale on your W2, a 1099A, 1099C, or FORECLOSURE

CALL for a 1 Hr Phone Appt to Calculate what you will OWE with your Extension.

Self-Employed (Sch. C) Business Income

Name: _____

Name: _____

Gross Income (with 1099-Misc): \$ _____

Gross Income (with 1099-Misc): \$ _____

Total Expenses: \$ _____

Total Expenses: \$ _____

Estimated Tax Payments You Paid

	Fed Amount	State Amount
4/15		
6/15		

	Fed Amount	State Amount
9/15		
1/15		

K-1 (Partnerships)

Name: _____ K-1: _____ Projected Profit or Loss: \$ _____

Name: _____ K-1: _____ Projected Profit or Loss: \$ _____

Pension

Name: _____ # of 1099-R's: _____

Name: _____ # of 1099-R's: _____

Rental Property Income

Rental Income: \$ _____ Rental Expenses: \$ _____

Stock or Real Property Sales

Estimated Profit: \$ _____ or Loss: \$ _____

Would you like a copy of your Extension? Yes No

If Yes we will add Extension confirmations to the portal in April

***Tax Owing Checks Need to Arrive at our Office by April 2**