

# Affordable Accounting and Escrow Services

1623 Sneffels Street  
Montrose, CO 81401  
Office (970) 240-2712  
Cell (970) 901-1603  
Fax (970) 240-2748

[julie@affordableaccountingllc.com](mailto:julie@affordableaccountingllc.com)  
[www.affordableaccountingllc.com](http://www.affordableaccountingllc.com)

## **2024 Extension only**

If you are unable to get us your actual information to complete a return by the deadline,  
this is an option we offer.

### 1. Basic Information

|                     |  |           |        |
|---------------------|--|-----------|--------|
| Taxpayer's Name     |  | SSN       |        |
| Spouse's Name       |  | SSN       |        |
| Taxpayer occupation |  | Birthdate | Blind? |
| Spouse Occupation   |  | Birthdate | Blind? |
| Address             |  |           |        |
| Phone               |  |           |        |
| Email address:      |  |           |        |

**Include a copy of Driver's license for Taxpayer and spouse.**

**Is the license expired? If so, please renew your license before you bring it to us.**

**We cannot file your return with an expired license.**

**We require a copy of the Driver's license every year to avoid delays.**

|   |   |
|---|---|
| On December 31 <sup>st</sup> you were LEGALLY: (circle one) |   |
| Single  | Single with a dependent   |
| Married   | If you were legally married, you must file a tax return with your spouse information. We will need Spouse information completed above. If your spouse filed a separate return, we need to know whether they itemized their tax deductions or took the standard deduction. |
| Divorced  | Provide a copy of the Divorce decree if the divorce took place during 2024  |

**Where you issued a PIN number by the IRS? If you were issued a PIN number in a prior year, you were issued a PIN for 2024 as well.**

\_\_\_\_\_ If Yes, provide us with the letter from the IRS

\_\_\_\_\_ If you lost the PIN number, you will need to contact the IRS to get it again.

<https://www.irs.gov/identity-theft-fraud-scams/get-an-identity-protection-pin>

**To the best of my knowledge, I will owe the following amounts on my 2024 tax return. I am asking for those amounts to be paid with the filing of an extension on my tax return.**

\_\_\_\_\_ Federal \_\_\_\_\_  
State of Colorado \_\_\_\_\_  
State of \_\_\_\_\_ \_\_\_\_\_  
State of \_\_\_\_\_ \_\_\_\_\_

\_\_\_\_\_ I believe my tax return for 2024 will be similar to my return for 2023.

\_\_\_\_\_ I would like Affordable Accounting to determine approximately how much I will owe based on the information I have. For this option, please provide us with the documents you currently have and an estimate of what you are missing

\_\_\_\_\_ I have no idea what I will owe. To avoid penalties and interest, we recommend you pay at least the same tax as you had on your 2023 tax return.

\_\_\_\_\_ Please file an extension with \$ 0 tax owed. Taxpayer will still be held responsible for interest on unpaid taxes. This extension will only save the failure to file penalty.

I will pay the taxes electronically myself. I would like Affordable Accounting to file the extension only  
Federal: [www.irs.gov](http://www.irs.gov)  
State of Colorado: [www.taxcolorado.gov](http://www.taxcolorado.gov)  
Other States: Search for the States Department of Revenue website.

I would like Affordable Accounting to pay my taxes electronically.  
Provide the following **AND a copy of a cancelled check or other form of verification** for the accounts listed.  
**We require this information be provided every year to avoid delays in receiving your refund(s) and/or making your tax payment(s). Even if information was provided in a prior tax year, we require the information be submitted again to ensure nothing has changed from what we have on file. Failure to provide this information will automatically result in the check by mail options above.**

Pay taxes owed with Checking account number ending (last 4 digits)\_\_\_\_\_

You cannot pay a tax payment from a savings account.

**Pay for our services**

Please enclose payment of \$50 for the filling of the extension. If you return to us to complete the tax return you will receive a \$25 credit towards the cost of preparation. If requested a link can be provided to pay by credit card.

**Taxpayer Certification**

The information provided is complete and accurate to the best of my knowledge.

\_\_\_\_\_ Signature \_\_\_\_\_ Printed name \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_ Signature \_\_\_\_\_ Printed name \_\_\_\_\_ Date \_\_\_\_\_