

## **ENGAGEMENT & REQUEST TO PROCESS INCOME TAX EXTENSION**

- 1.) Your request to engage JPT Financial Solutions Inc. to prepare and file an income tax extension is a tax service **separate and distinct** from preparing and filing your final tax return. As such, a **separate** fee to prepare and file your income tax extension will be charged for this service.
- 2.) Our professional service fees for tax return preparation are calculated in proportion to the amount of work necessary to complete your return. This includes time spent assembling and reconciling documentation supplied by the client, as well as follow-up discussions with the client (verbal and/or written e-mails) for supplemental data or clarification of information received from the client.
- 3.) We will prepare your requested federal and requested state/local income tax extensions based solely on information that you provide to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information.
- 4.) You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that you have disclosed to us all relevant facts affecting the returns. The accuracy of the information and completeness of the representations reflected in your return is your responsibility.
- 5.) You understand that filing an extension allows additional time to complete and file your final tax return, but it does not allow for an extension in time for paying any tax due.
- 6.) Our fees are payable by you immediately after completion and approval by you of the tax extension. **A 1.5% monthly interest late fee will be reflected on all past due accounts over 15 days.**
- 7.) You understand that in order for JPT Financial Solutions to satisfy IRS requirements to sign-off on your tax return as a "paid preparer", **it is required that clients remit payment to JPT Financial Solutions for services prior to the electronic filing of your extension.**

Thank you for giving us the opportunity to serve you. May God bless you.

JPT FINANCIAL SOLUTIONS, INC.

**CLIENT ACKNOWLEDGEMENT OF ENGAGEMENT CONTRACT**

CLIENT TAXPAYER

SPOUSE (IF JOINT PERSONAL RETURN)

Accepted by  
(Please Print)

\_\_\_\_\_

\_\_\_\_\_

Signature  
of Client

\_\_\_\_\_

\_\_\_\_\_

Date

\_\_\_\_\_

\_\_\_\_\_

**PROVIDE TAX YEAR & CLIENT DATA FOR EXTENSION**

Current Tax Year (4 digits):

Today's Date:

Taxpayer Name:

SSN:

Spouse Name:

SSN:

Address:

Apt No.

City:

State:

Zip:

Country:

**IDENTIFY INCOME TAX EXTENSIONS (IRS/INDIVIDUAL STATES) TO BE FILED**

IRS

Connecticut

New Jersey

Other State #1:

\_\_\_\_\_

New York

Other State #2:

\_\_\_\_\_

**PROVIDE DETAILED DATA TO FILE EXTENSION**

If you are making a payment with the filing of this extension please be sure to complete the electronic funds withdrawal section of the separate "Direct Deposit & Electronic Withdrawal Information" form.

**IRS**

(a) Estimate of Total Tax Liability for the Current Tax Year:

(b) Payments Already Made for the Current Tax Year:

(c) Balance Due (Subtract box "b" from box "a"):

(d) Amount you are paying to the IRS with this extension:

**NEW JERSEY**

(a) Amount you are paying to the State of NJ with this extension:

**NEW YORK**

(a) Estimate of New York State Income Tax Liability for the Current Tax Year:

(b) Estimate of NY City Income Tax Liability for the Current Tax Year:

(c) Estimate of Yonkers Income Tax Liability For the Current Tax Year:

(d) Sales and use tax due for the Current Tax Year:

(e) Total Taxes (add amounts in boxes a,b,c,d)

(f) Payments Already Made for the Current Tax Year:

(g) Balance Due (Subtract box "f" from box "e"):

(h) Amount you are paying to the State of NY with this extension:

**CONNECTICUT**

(a) Estimate of Total Tax Liability for the Current Tax Year:

(b) Payments Already Made for the Current Tax Year:

(c) Balance Due (Subtract box "b" from box "a"):

(d) Amount you are paying to the State of CT with this extension:

**OTHER STATE #1** \_\_\_\_\_.

(a) Estimate of Total Tax Liability for the Current Tax Year:

(b) Payments Already Made for the Current Tax Year:

(c) Balance Due (Subtract box "b" from box "a"):

(d) Amount you are paying to Other State #1 with this extension:

**OTHER STATE #2** \_\_\_\_\_.

(a) Estimate of Total Tax Liability for the  
Current Tax Year:

(b) Payments Already Made for the  
Current Tax Year:

(c) Balance Due (Subtract box "b" from box "a"):

(d) Amount you are paying to Other State #2  
with this extension: