

Extension Policy

DEADLINE: March 15, 2021

ALL information/documents must be to our office by this date. This means if we determine there is even one missing piece of information, for example, an investment statement or K-1, you have not met this deadline and you will be put on extension.

- For information **received by March 15th**, (see above statement) every effort will be made to complete your tax return by the April 15 deadline. There will be no additional charge for an extension to be filed on any return we are unable to complete by April 15th.
- For information **received after March 15th**, any tax return we are unable to complete by April 15th, we will calculate your tax due, to the best of our ability with the information you've provided, and then file the Federal/State/School District/City extensions (**\$50 minimum fee**).

If you are on extension

The processing of returns on extension will begin after May 1, 2021.

If you have a corporation or partnership tax return on extension, your supporting documents must be to our office no later than **August 1, 2021**.

If your personal tax return is on extension, your personal documents must be to our office no later than **September 1, 2021** in order to complete your tax return by the extension deadline of October 15th.

Why this policy?

We feel a deadline is important in order **to better serve our clients by giving your tax returns the attention they deserve**, rather than rushing the process during the final several weeks. We look forward to continuing to serve you. If you have any questions, please call our office.