

# Extension Policy

**DEADLINE: March 15, 2025**

*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 15<sup>th</sup>**, (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 15<sup>th</sup>.
- For information **received after March 15<sup>th</sup>**, any tax return we are unable to complete by April 15<sup>th</sup>, 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 (**\$75 minimum fee**).
- Underpayment penalties are assessed by the taxing agencies for any tax due that is not paid by the original tax return deadline. Late arriving and incomplete documents create the potential situation for incorrect tax calculation at extension time. **We are not responsible for any penalties incurred for late payments.**

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## **If you are on extension**

If you are on extension, the deadline for **ALL DOCUMENTS** to be to our office is **June 1, 2025**. We will not guarantee timely completion by the IRS' extension deadlines, if your docs arrive after June 1.

## **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.