

Lincoln Tax Professionals, LLC
 Tax Experts/Financial Educators
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New Client Information Form

Welcome to Lincoln Tax Professionals! We want to take a moment to see what your needs are and confirm that we are a great fit to meet those needs.

Please send us the following documents through our secure portal:

- a) This completed form.
- b) Driver's License (or State Identification)
- c) Three (3) years of your most recent, complete, filed tax returns (federal and state – all pages).

Name (**Taxpayer**) _____
 Social Security # _____
 Date of Birth _____
 Occupation _____
 E-mail Address _____
 Best Phone # _____

Name (**Spouse**) _____
 Social Security # _____
 Date of Birth _____
 Occupation _____
 E-mail Address _____
 Best Phone # _____

Address _____

Referred By _____

<u>Names of Dependents</u>	<u>Date of Birth</u>	<u>Social Security #</u>	<u>Relationship</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Please answer yes or no to each of the following:

1. Have you filed return in previous tax years? If you have not, explain in detail on the back of this form.

2. Have you received any letters from the IRS or any state in the past three years? If yes, provide details:

3. Did you sell or purchase a home or other property? If yes, please provide details about cost and sale price.

4. Did you sell any stocks? If yes, please provide details about the cost and sale price (or at least an estimate):

5. Any significant change in income (up or down) from the prior year? If yes, provide details:

6. Any significant change in expenses? For example, large increase or decrease in medical expenses, education, business, or other expenses. If yes, provide details:

7. Any change in the number of your dependents from the prior year, up or down? If yes, provide details:

8. Any other major changes or reasons that might make you expect to OWE money to the IRS or to your state this year? If yes, explain (or attach a statement):

9. Did you buy a home in 2008 and get the 1st Time Home Buyers Credit?

Yes	No

Anything else we should know about your tax or financial history?

Why are you looking for an accountant?

What you should know if we think filing an extension is right for you.

What is an extension?

If you are not able to file your federal individual income tax return by the due date, you should get an automatic 6-month extension of time to file your return. Matthew and Ryan will file the Form 4868, Application for Automatic Extension of Time To File U.S. Individual Income Tax Return, for you. This form must be filed by the due date for filing your return, usually April 15.

Most states also allow for filing an extension as well. Some do not require you to do anything if you file a federal extension; others require you to file a separate form.

As Enrolled Agents, Matthew and Ryan can file an extension on behalf of a client without needing the client to sign any forms.

What if I owe money?

It is important to note that an extension of time to file does not give you more time to pay if you owe money. This is why Matthew and Ryan want to review a client's file prior to preparing an extension. If we believe you might owe, we will send you a voucher to make a payment with your extension or you can choose to pay online (see below). If you can't pay what you owe, even just filing the extension will drastically reduce the penalties for late payment of tax.

Are Extensions a "Red Flag"?

Filing an extension is a very common event. In recent years, over 10 million taxpayers filed an extension each year. Filing an extension is not a red flag and you can still electronically file.

Pay your taxes online

Use this secure service to pay your individual tax bill or estimated tax payment directly from your checking or savings account at no cost to you. You'll receive instant confirmation that your payment has been submitted. Bank account information is not retained in IRS systems after payments are made.

If you have already made a payment through Direct Pay, you can use the Look Up a Payment feature to view your payment details and status. You can modify or cancel your payment there until two business days before your payment date.

This is a great way to make a quick and secure payment ahead of the IRS tax deadline. Visit our website at www.lincolntax.com/direct-pay to learn more and also see where you can pay your state tax payments online.