

Wheeler's Tax Service

110 S Joseph St
APPLETON, WI 54915
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Subject: Preparation of Your 2023 Income Tax Extension

Thank you for choosing Wheeler's Tax Service to assist you with your 2023 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide when filing an extension.

Extension Preparation

- ~ We will file your 2023 federal and state income tax return extensions based on information you provide. An Organizer will be provided to help you collect the data required for your return and extension. The Organizer will help you avoid overlooking important information. A timely and accurate organizer allows us to file a more accurate extension. Accurate extensions with extension payments minimize penalties and interest due on filing of the return.
- ~ If you expect to owe money, it is your responsibility to make extension payments by April 18th. Any late payment penalties assessed for tax returns on extensions are the sole responsibility of the taxpayer.
- ~ A non-refundable deposit of \$50 dollars is due with the extension request, as well as this engagement letter and a completed organizer. The deposit will be credited to your final bill.

Extension Deadlines

- ~ Extension request for Individual income taxes, including deposit, completed organizer, and signed engagement letters, are due at 12:00 pm on April 15, 2024.
- ~ All final documents for individual income taxes are due August 15, 2024.
- ~ Tax extension requests for Partnerships, S-Corporations, Estates, and Trusts, including deposit, completed organizer, and signed engagement letters, are due at 12:00 pm on March 13, 2024.
- ~ All final documents for Partnership, S-Corporation, Estates, and Trusts are due August 1, 2024.
- ~ If we receive your information after these dates, we cannot guarantee a timely filed return. Also, your return may be subject to a rush fee of up to \$100

Signatures

By signing below, you acknowledge that you have read this letter, understand, and accept your obligations and responsibilities, and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Thank you for the opportunity to be of service. If you have any questions, contact our office at info@wheelerstax.com or (920)731-7859.

Sincerely,
Wheeler's Tax Service

Accepted By:

Taxpayer/Business (print name)

Spouse, if applicable (print name)

Taxpayer signature

Spouse signature, if applicable

Date

