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2016 Tax Packet

Dear Client:

Enclosed is your 2016 Tax Packet. Completion of the enclosed information sheets is essential to make sure that your tax return is accurate. Our Packet, as cool as it is, may not cover all your tax events of the year, so please use our additional information page for things not listed in The Packet, and *don't* be shy; if we don't know about it, we can't help. Please don't hesitate to use our envelope to have your returns prepared by mail or to drop off your forms at our office.

Should you prefer to come see us in the flesh, appointments are available at all of our offices all season long. Please give us a call to schedule a time and office location that is most convenient for you.

In any case please complete the packet so that all the information needed to help us prepare your returns is available. **New clients, please include a copy of your 2015 tax return, both federal and state.**

Should you want to file an automatic extension, please read and sign the last page of our packet, then forward it, with the information it asks for, to us by April 1, 2017.

If you have any questions while completing this packet, please don't hesitate to call us.

Best Regards,
From all of us at
Constellation Financial in association with H&R Block!

Hello IRS can I help you?...Actually that's a fairly common question Mr. Smith. So yes, as a matter of fact; we ARE equipped to take your soul in lieu of cash.



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(Only if you won't get your taxes done before 4/18/17)	

Keep an eye out for our NSFF (Not-So Fun Facts) throughout the packet

Message from Stephen:

You may notice our packet has been changed up some this year. Although change is sometimes difficult, this one is our attempt to optimize our procedures based on your needs. Please never hesitate to contact us with questions or concerns while completing your packet, or with any other tax or financial matter you may be facing.

We are looking forward to hearing from you and helping you with your income taxes. Totally safe to talk Red Sox with me this year; first place in the East looked very nice to me. ☺

This packet has been designed to, at least partially, be enjoyable... We apologize to any who might find offense with any of the humor or statements contained within.

Tell Us About You

CLIENT:

First Name & Initial **Last Name:**

Social Security No. **Date of Birth:** MM DD YYYY

Best Phone No. **Occupation:**

Best E-Mail:

SPOUSE:

First Name & Initial **Last Name:**

Social Security No. **Date of Birth:** MM DD YYYY

Best Phone No. **Occupation:**

Best E-Mail:

Home Address:

Number and street

City, State, Zip

Mailing Address:

Number and street

City, State, Zip

DEPENDENTS

First Name & Initial **Last Name**

Social Security No. **Date of Birth** MM DD YYYY

Relation:

First Name & Initial **Last Name**

Social Security No. **Date of Birth** MM DD YYYY

Relation:

First Name & Initial **Last Name**

Social Security No. **Date of Birth** MM DD YYYY

Relation:

More than three? God Bless you...Use my additional information page please. ☺

Items Required

Whether you call it Obama Care, or Romney Care, or don't care for it at all, the Affordable Care Act is something we all have to address. Most Mass Residents will receive a 1099-HC like previous years. Anyone who received Health Care through The Market Place will also receive a 1095-A, and we **require both** forms to get your taxes done accurately...sorry. ☹

- | | Yes | No | N/A |
|--|-----------------------------|--------------------------|--------------------------|
| 1. We'll Need Market Place 1095 – A | 1. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Mass Residents We'll need your 1099-HC also | 2. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Don't forget to send us your...

- | | Yes | No | N/A |
|--|-----------------------------|--------------------------|--------------------------|
| 1. W-2 forms – (Full or part time employment tax form) | 1. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. 1099 INT – (Interest Income from Banks Accounts) | 2. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. 1099 DIV – (Dividend Income from Brokerage Accounts) | 3. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. 1099 SSA – (Social Security Income) | 4. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. 1099 R – (Retirement distributions from 401K, IRAs, et al.) | 5. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. 1099 MISC – (Miscellaneous Income/Casual Labor...) | 6. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. K-1 Forms – (Trust Beneficiaries, S-Corp owners, Partnerships...) | 7. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Any other forms labeled IMPORTANT TAX DOCUMENT. ☺ | 8. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Don't forget to tell us about your...

- | | Yes | No | N/A |
|--|-----------------------------|--------------------------|--------------------------|
| 1. Fantasy Football Winnings. (I know what you're thinking)
More than 74.7 Million Americans play fantasy sports now and
IRS has assigned many resources to track under reporting of income/winnings. Just sayin'. | 1. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Alimony/Palimony Income. | 2. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Unemployment – (You should receive a 1099 or substitute form) | 3. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Last year's STATE refund. – (Should also get a 1099 or subst.) | 4. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Foreign Bank Account. – (accounts in The Caymans? Call me... ☺) | 5. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. ANY other income. (Global income is reportable to IRS.) | 6. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Deductions!

MORTGAGE INTEREST EXPENSE...

You should have received form 1098 from your mortgage holder letting you know how much interest you paid during 2016. Please include that/those 1098 form(s) with your packet.

- | | Yes | No | N/A |
|--|-----------------------------|--------------------------|--------------------------|
| 1. 1098 Form(s) from mortgage holders
If you have more than one 1098 please tell us what each 1098 is for by writing on the form itself before submitting to us.
i.e. "Equity Loan", "Refinance", "2 nd Home" | 1. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Did you refinance? Buy or sell your home this year?
Please include the H.U.D. from purchase, refinance or sale | 2. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

(Special situation? Don't be shy...Call Us! 978-266-1930 ☺)

REAL ESTATE TAX DEDUCTION...

(Do Not Include any Rental Property Information in This Box)

1. Real estate taxes paid on your **primary** residence..... \$
2. Real estate taxes paid on a second home or plot of land..... \$

OTHER TAXES...

1. Amount paid for state excise tax on automobiles..... \$
2. Amount paid for personal property tax (Boats, trailers, snowmobiles.....)..... \$
3. Sales taxes paid (List separately large ticket items such as cars, boats.....).. \$

RENT/OCCUPANCY DEDUCTION...

Name of Landlord _____ Rent Paid..... \$

Address You paid rent for: _____
(If different from your current address)

NSFF #1: 44.9% of registered voters in The United States did not vote this past presidential election.

Deductions!!

MEDICAL EXPENSES...

Un-reimbursed Medical Expenses must exceed 10% (7.5% if over 65) of your Adjusted Gross Income before any deduction is allowed.

1. Prescription drugs (sorry no over the counter):
2. Eye glasses and contact lenses
3. Hospital and clinic visits
4. Doctors, dentists, psychiatrists, acupuncturist, chiropractors:
(oculists, podiatrists, physical therapists...did I miss anyone?)
5. Medical insurance you paid (not including pre-tax plans)
6. Long term care insurance
6a = CLIENT 6b = SPOUSE
7. Miles driven for medical reasons (19 cents per mile this year) miles

IF YOU ARE LUCKY ENOUGH TO PAY ALIMONY / PALIMONY...

(Child Support is not deductible. However you may want to review your divorce agreement with regard to which of you is allowed to claim the child each year.)

1. Amount paid by Client \$ Amount Paid by Spouse \$
2. Recipient's Name _____ Recipient's Name _____
3. Recipient's Social Sec. # ____/____/____ Recipient's Social Sec. # ____/____/____

CHARITIES...

1. Total of cash and checks you donated to charity.....(receipts required)..... \$
(If over \$250 to one organization please list them separately; name and amount, on our additional info page.)
2. Goodwill box: Clothes, old furniture...Appraisals may be required..... \$
3. Miles driven for charity (14 cents per mile this year)..... miles
4. Large ticket gifts to charity: Cars, appreciable property, stock...
Please list on our additional info page, include receipt and appraisal form.

NSFF #2: That means almost 147 MILLION Americans chose to stay home rather than vote. Being a former soldier, that kind of hurts. Just saying.

Deductions!!!

CHILD CARE...

(For parents who also have a day job. ☺)

Yes

No

N/A

1. Are you covered by an employer sponsored reimbursement plan?

2. Most Child Care Providers will provide you with this information at year end or upon request. If you get their form you can skip the rest of this section. If not, we'll need all the following so that you can claim your child care expenses.

Name of Provider

Which Child?(Name)

Amount Paid

\$

FID#

Provider's Address:

OR

SS#

Number & Street

City, State, Zip

NON-REIMBURSED VEHICLE EXPENSES...

If you work for a company that does not reimburse you for work related use of your vehicle, *this box is for you.*
(I do not need to see your log book, but you MUST keep it with your files each year.)

1. Total miles put on your vehicle for **all** purposes during 2016..... 1. miles
2. Total miles driven for work or between jobs that were not reimbursed..... 2. miles
3. Total commuting miles during 2016..... 3. miles
4. Total other personal miles during 2016..... 4. miles
5. Total dollars spent for vehicle expenses in 2016..... 5. \$
(Gasoline, insurance, inspections, repairs, tune-ups)

AUDIT WARNING

This area is where most auditors have focused their efforts when reviewing a tax return; mostly because it's easy money for them. A couple of tips to help us defend you, and hence help your wallet, should you ever get audited. **Please note I do not need to see this information to prepare your taxes each year.**

1. Use a log book! This cannot be overstated. The very first question each audit is: Where is your client's log book? No log book = no deduction under audit.
2. Get a letter from your employer stating your job function and that you are required to travel for your job.
3. I do not need these back up documents to prepare your income taxes but you should keep them with your file at home for the full 3 years.

Deductions!!!!

ADDITIONAL NON-REIMBURSED EMPLOYEE EXPENSES

(Office supplies, Cell phone use, Internet, Laptops, Customer meals...)

Expense:

Amount:

1.	<input type="text"/>	\$ <input type="text"/>
2.	<input type="text"/>	\$ <input type="text"/>
3.	<input type="text"/>	\$ <input type="text"/>
4.	<input type="text"/>	\$ <input type="text"/>

MISCELLANEOUS DEDUCTIONS...

1. Union and professional dues / Professional licenses	<input type="text"/>	1.\$
2. Accountant & tax preparation fees	<input type="text"/>	2.\$
3. Job searching: Resume, phone calls, travel	<input type="text"/>	3.\$
4. Legal fees for tax advice	<input type="text"/>	4.\$
5. Your cost for tools at work: chalk, notebooks, teaching/training aids...	<input type="text"/>	5.\$
6. Work clothes and uniforms	<input type="text"/>	6.\$
7. Safe deposit box	<input type="text"/>	7.\$
8. I.R.A. fees (typically \$35 per IRA account)	<input type="text"/>	8.\$
9. Work related books and magazines	<input type="text"/>	9.\$
10. Investment advice / Trustee fees (Do not include broker commissions)	<input type="text"/>	10. \$
11. Sales Tax Paid (must be MORE than your state income tax to help)	<input type="text"/>	11. \$
12. Commuter Deduction (Mass Residents ONLY)	CLIENT a.	<input type="text"/>
(MBTA and tolls only for driving to and from work)	SPOUSE b.	<input type="text"/>
		12a. \$
		12b. \$

College Expenses & Student Loans

THE AMERICAN OPPORTUNITY TAX CREDIT...

This credit covers all four years of college, and provides for extra deductions:

- | | Yes | No | N/A |
|--|-----------------------------|--------------------------|--------------------------|
| 1. Did you receive form 1098 – T for anyone in your house?
a. Make sure you include it in your packet. ☺
b. Also the tuition statement detail report from the college. | 1. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Any scholarships received not listed on form 1098 – T? | 2. <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Additional expenses not included on form 1098 – T?
a. Please describe what these are and for which student if applicable: | 3. \$ | | |

THE LIFE TIME LEARNING CREDIT...

This box is for you to list the amount of higher education costs you paid for any students in your family (yourself included) during 2016. **DO NOT include any amounts listed under “Career Related Education” or “The American Opportunity Credit”.**

Name of Institution: (College/University Name) Student:

Amount Paid:

1. \$

2. \$

CAREER RELATED EDUCATION & HIGHER EDUCATION DEDUCTION

(For seminars, continuing education, or schools directly related to your current career and making you more employable by taking them.)

1. Amount paid by Client

\$

Amount Paid by Spouse

\$

STUDENT LOAN INTEREST...

1. Amount paid by Client

\$

Amount Paid by Spouse

\$

Form 1098 – E is the culprit this is reported to you on. We like to see the 1098 – E...

NSFF #3: Translating that to dollars, that would mean that almost 4 TRILLION dollars will be spent this year without being voted for, so to speak. That is a lot of zeros.

Retirement Plan Contributions

I.R.A. CONTRIBUTIONS...TRADITIONAL I.R.A. ONLY

(Please do *not* list amounts on your W-2 form)

1. **Client's** Contribution:

\$

Spouse's Contribution:

\$

**IRA maximum contribution is \$5,500 (\$6,500 if your age is 50 or older.)
for the 2016 tax year.**

Contributions can be made up 'til April 15, 2017 depending on a bunch of IRS rules.

Please include your year-end I.R.A statements.

ROTH I.R.A. CONTRIBUTIONS

Contributions to a ROTH I.R.A. are not tax deductible. Also, not all people are eligible to make them. We will verify your eligibility or your need to re-characterize ROTH contributions if you list amounts here.

1. **Client's** Contribution:

\$

Spouse's Contribution:

\$

Contribution limits are the same as the traditional I.R.A.

KEOGH CONTRIBUTIONS

The Self-Employed Person's Retirement Plan

1. **Client** Contribution:

\$

Spouse's Contribution:

\$

Keogh Plans have two aspects, Money Purchase and Profit Sharing Plans. Please be sure to discuss with us the apportionment between to the two plans with your specific Keogh Retirement Plan.

S.E.P. I.R.A. CONTRIBUTIONS

(Also for the Self-Employed)

1. **Client** Contribution:

\$

Spouse Contribution:

\$

NSFF #4: An independent study recently states that the average American Household age group 25 – 64 has only \$3,000 saved for retirement... Almost half have none! It's never too late to start saving! (So call us ☺)

Estimated Income Tax Payments

FEDERAL (IRS) ESTIMATED PAYMENTS

(Due Date)	DATE PAID:	AMOUNT PAID:
(4/15/16)	<input type="text"/> / <input type="text"/> / 2016	\$ <input type="text"/>
(6/15/16)	<input type="text"/> / <input type="text"/> / 2016	\$ <input type="text"/>
(9/15/16)	<input type="text"/> / <input type="text"/> / 2016	\$ <input type="text"/>
(1/15/17)	<input type="text"/> / <input type="text"/>	\$ <input type="text"/>

STATE (Your Home State) ESTIMATED PAYMENTS

(Due Date)	DATE PAID:	AMOUNT PAID:
(4/15/16)	<input type="text"/> / <input type="text"/> / 2016	\$ <input type="text"/>
(6/15/16)	<input type="text"/> / <input type="text"/> / 2016	\$ <input type="text"/>
(9/15/16)	<input type="text"/> / <input type="text"/> / 2016	\$ <input type="text"/>
(1/15/17)	<input type="text"/> / <input type="text"/>	\$ <input type="text"/>

Last Year's State Payments:

Your January 15, 2016 estimated payment was for 2015 taxes. However, please tell me the amount of your **STATE** payment and the date you made it. This payment can be deducted if it was made during 2016.

DATE PAID: / / AMOUNT PAID: \$

APPLICATION OF LAST YEAR'S REFUND

1. Federal Amount Applied \$ 2. State Amount Applied \$

This is for folks who elected to have the government hold 2015's refund and apply it to this year's taxes.

NSFF #5: A recent statistic from the Office of Personnel Management states that there are approximately 2.79 Million civilian, (i.e. non-uniformed) employees of the US Government.

Self Employed Income & Expenses

Whose Business is it anyway? **Client / Spouse**

1. Name of the company

2. Type of work you do

Fed ID# (If Appl.)

3. Business address

INCOME

1. Income: Total Money Received by your company during 2016.
(For most, this figure should be the same as your business deposits.)

2. Ending Inventory: Your Cost of Unsold Merchandise as of 12/31/16
(For companies that buy and re-sell products)

EXPENSES

1. Purchases of Product for Resale

2. Advertising

3. Insurance

4. Legal / Professional Fees

5. Office Expenses / Postage

6. Rent: Office or Warehouse Space

7. Repairs & Maintenance

8. Job Supplies / Tools & Small Equipment

9. Heat, Light, Power, & Telecommunications (Phones/Beepers...)

10. Dues & Subscriptions

11. Travel & Entertainment ---Exclude Meals!

12. Meals

13. Interest Expense

14. Taxes – (Do Not List Estimated Income Tax Payments Here!)

Self Employed Income & Expenses

EXPENSES...CONT.

15. Salaries & Wages

15.\$

16. Contract Labor Paid...Anyone over \$600 needs a 1099 form.

16.\$

17. Commissions Paid

17.\$

18. Rental Equipment

18.\$

19. Other Expenses: (New Equipment...)

19.\$

MOTOR VEHICLE EXPENSES

1. Total Miles Driven For **all** Purposes during 2016

miles

a. Business Portion of Line One.(54 cents per mile.)

(These figures should come from your log book...the one you need to keep updated daily. I.R.S. guidelines state that you must have a log book of your miles to qualify for the deduction.)

3. Year Vehicle was placed in service for your business.....

4. Purchase Price of your Vehicle.....

5. Actual Expenses for your vehicle during 2016.

(Gasoline, insurance, inspections, repairs, tune-ups).....

For most self-employed people, mileage deductions are more advantageous; so you may skip item 5 of this box unless you believe your actual expenses will exceed 54 cents per mile.

I.R.S. needs this information on each business vehicle.

NSFF#6: In 1913 The US Tax Code was only 400 pages long. It had only grown by 104 pages in its first 26 years...

Home Office Page

IF YOU OWN YOUR OWN BUSINESS & HAVE A HOME OFFICE...I NEED THE FOLLOWING INFORMATION:

Please do not list expenses here that you have previously listed anywhere else in this packet.
This home office page is for self-employed businesses only.

1. What is the total square footage of your home? Square Feet
2. What is the total square footage of your home office? Square Feet
3. Are you a qualified home day care provider? (Circle One)
(If yes go to question 4...otherwise skip to the next box) YES / NO
4. How many hours was your home used as a day care facility in 2016? Hours

HOME OFFICE EXPENSES:

WE NEED TOTAL AMOUNTS FOR THE ENTIRE HOUSE, FOR THE ENTIRE YEAR PLEASE.

AMOUNT YOU SPENT FOR:

1. Rent

2. Heat, Light, Power...(All Basic Utilities)

3. Water

4. Telephone. Extra charges for business use only.

5. Insurance (Home Owners / Renters)

6. Maintenance Costs:

A. Painting

B. New Siding

C. New Roof

D. Other

Rental Properties

GENERAL RENTAL INFO:

1. Type of Rental (Single Family, Duplex, Parking Lot, Apartment...)
2. Date Property was first RENTED: (Not always the purchase date)
3. Purchase Price if bought or first rented during 2016. \$
4. Did you or your family use this property for more than 15 days or more than 10% of the total time rented this year? ---Please Circle One... YES / NO

INCOME & EXPENSES

INCOME:

Total of Rents Received During 2016. (Excluding Security Deposits) \$

EXPENSES:

1. Advertising
2. Auto & Travel
3. Cleaning & Maintenance
4. Rental Agency Fees, Commissions, & Condo Fees
5. Insurance
6. Legal & Professional Fees
7. Mortgage Interest Paid... You should have received a bank form
8. Real Estate Taxes Paid
9. Repairs – (Not Improvements! Eg. Replacing broken window)
10. Improvements – (Eg. Upgrading an older type of window)

Describe Improvement:

11. Any Other Expenses

Investors...

ALL TAXPAYERS WHO SOLD STOCK MUST PROVIDE THIS INFO: (No Kidding)

AND the Government has made it easier on you...ALL brokerage houses are now required to provide cost basis information on all investment sales. So please make sure to include this information in your envelope. However, should your brokerage house not be able to comply with the new regulation, please list information below for each stock or investment sale...

Name of Stock:	Purchase Date:	Date of Sale:	Sale Proceeds:	Cost of Purchase:

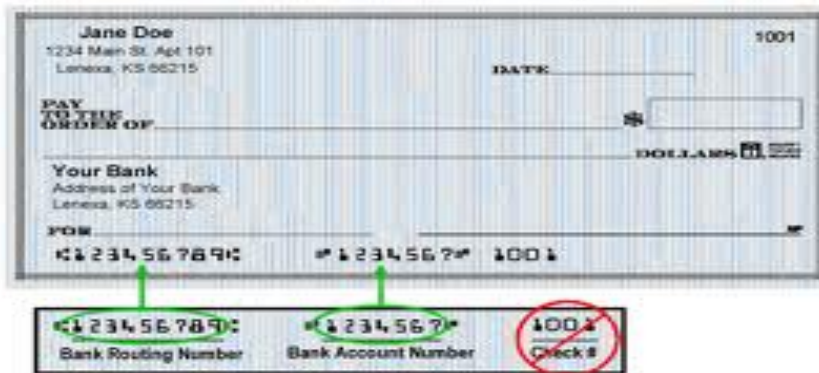
Clients who also benefit from the hard work of Constellation Financial and Wealth Management Services for their investments, need not complete this section for accounts held with our office. ☺

NSFF#7: NOW The US Tax Code contains over 73,000 pages!!! Up from 504 pages in 1939.

Bank Information

Individual taxpayers are NOT required to pay their taxes or receive their refund(s) electronically. However, if you desire direct deposit of your refund or automatic withdrawal of your tax due, please read on.

Some of the lucky few receiving refunds may enjoy the convenience of Direct Deposit of their refunds or, the unlucky ones, Automatic Withdrawal of their taxes due. This is not giving the I.R.S. access to your bank accounts or records, well no more than they already have; it is merely a way of securely delivering your refund to you. For those paying taxes electronically, it is the same as writing a check, without the hassle of postage. ☺



Name of Bank or Financial Institution:

Whose name is on the account?

Bank Routing Numbers (See Above):

Bank Account Number (See Above):

Checking Account: ----- OR ----- Savings Account:

We will ALWAYS contact you prior to authorizing the government to deposit your refund or withdraw your taxes due from your Bank Account. Providing information here allows us to be more efficient for you when you decide to make that decision.

Credit Card Payment of your Income Taxes is available. Please ask for details if you're interested.

ALSO, we do offer a service that can give you the option of withholding our fee from your expected refund, however this is NOT the form that authorizes us to do so. If you would like to learn more about our Pay Nothing Out of Pocket product, please let us know.

You do have the option of depositing your refund into more than one account. Please ask for details if you're interested.

Extension Request

To My Good Friends at Constellation Financial/H&RBlock:

I am requesting that you file an automatic extension of time to file my 2016 income tax returns on my (and my spouses) behalf. I understand that this is an automatic extension of time to file, not pay, my income taxes and that penalties for paying late may apply to me, should I owe additional taxes after April 18, 2017.

I further understand that this is an automatic extension of time to file until October 16, 2017 and that the IRS and DOR must approve any additional extensions.

Sorry this sounds so “lawyer like” but it’s very important that you fully understand what you’re signing.

YOU **MUST** CHOOSE TWO OF THE FOLLOWING OPTIONS:
(Please mark with an “X”)

I don’t expect to owe any additional taxes on my 2016 Federal tax return.....

I don’t expect to owe any additional taxes on my 2016 State tax return.....

I have enclosed a check made payable to the “United States Treasury”
in the amount I expect to owe on my 2016 Federal tax return.....

I have enclosed a check made payable to my state’s department of revenue,
(Commonwealth of Massachusetts for Mass residents) in the amount I
expect to owe on my 2016 State tax return.....

Enclosed are my W-2 forms for 2016 and/or a list of estimated tax payments I have made for the 2016 tax year.

SIGNATURE SECTION:

I have read the above text and I fully understand the request I am making for extensions.

Full Name:

Social Sec#:

Date of Birth:

Signature: _____

There is a \$100 deposit due with all extension requests, which will be applied to the cost of preparing your income tax returns. Thank you for your cooperation.

Please detach this form from our packet and mail or drop it by to us so that we receive it by April 1, 2017. Unfortunately, we cannot guarantee timely filing if received after that date...but we’ll try like hell!