

Income Tax Preparation Extension Preference Questionnaire



We are trying something new to help us streamline our process. Please take a moment to fill out your preference below.

Your name: _____ Date: _____

- 1 “No problem...go ahead and plan on extending me.”
(Recommended for clients with large portfolios who get late or updated statements)
- 2 “If you need to...okay. But give me plenty of notice, especially if I’m going to owe. I hate surprises.
And I agree to get my information in no later than **Saturday, March 19, 2015**
- 3 “I’m on the fence. I’m willing to consider it but I’d really prefer NOT to extend my tax return.”
- 4 “Due to special circumstances I really can’t be extended this year.” Please, tell us why:

Also, please understand that, to accommodate you, we will need to have ALL of your information in no later than **Saturday, February 27, 2016.**
- 5 “I just don’t want to be extended.”
To accommodate you, we will need to have ALL of your information in no later than **Saturday, February 27, 2016.**
- 6 “Other Please Specify” _____

Visit our website at www.grasscpa.com

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