



S. J. & J. Inc.
Tax Preparation & Bookkeeping Services

Extension Instructions

If you are filing an extension Leah will need the following information **before April 1, 2026**. If it gets here after that Leah cannot guarantee that the paperwork will be filed timely.

If you have a balance owed with the extension that needs to be paid by April 15th. The extension is for more time to file not more time to pay!

You need to send information before April 1, 2026.

- W2's (all of them)
- 1099 information if self-employed
- Social Security Income
- Retirement Income
- Any Income you received that is not listed above.
- Expenses to offset 1099 Income.
- Mortgage Information
- Any official documents you received in the months of January and February
- Estimated payments made to the IRS and State

There will be penalties assessed by the Internal Revenue Service and The Massachusetts Department of Revenue if you do not pay your tax liability with the extension or make estimated payments. Yes, you will have to pay these fees if you do not pay your taxes in the time allotted. No, the fees are not negotiable.

All the other information will be taken when you have your official tax appointment. If you have any questions, please call the office at 508.559.9442.

All returns will be electronically filed unless you have a balance due and then the payment coupons and instructions will be mailed to you by April 15, 2026. If you would like the balance due to be direct withdrawn from your checking account, please let Leah know.