

Filing an Extension

Note: This information was compiled by the Pisgah Legal Services Health and Economic Opportunity Program, and does not constitute legal advice.

If you are unable to file your tax return by April 15th, you can file for an extension with the IRS. Here are some notes about filing an extension:

- Filing an extension gives you until October 15th of the current year to file your taxes.
- An extension of time to file your return does not grant you any extension of time to pay your taxes. Your taxes are still due by April 15th, and interest will begin accruing after that day.
- You should estimate and pay any owed taxes by your regular deadline to help avoid possible penalties.
- You must file your extension request no later than April 15th.
- Pisgah Legal Services *cannot help you determine* your tax liability or amount previously paid.
- If you would still like Pisgah Legal Services to help you after the filing deadline, please call us after April 22nd at 828-210-3404.

Two Ways to File an Extension:

- 1) Mail in the form 4868: Application for Automatic Extension of Time to File US Individual Income Tax Return (<https://www.irs.gov/pub/irs-pdf/f4868.pdf>)
 - a. You can also come to the Pisgah Legal Services Asheville Tax office at 109 Central Ave between 9am-2pm on Friday, April 12th, or between 9am-2pm on Monday, April 15th to fill out a copy and we will mail it for you. Note that we *cannot help you fill out the form*, but we can print the form for you and mail it for you.
 - b. If you are applying for an ITIN, you can *only* mail in an extension, you cannot e-file it.
- 2) Use the Pisgah Legal Services FSA link to e-file an extension.

Filling Out the Extension Form Online or By Paper

Beyond filling out your personal information, the online and paper forms will each ask you about your tax liability, your total 2023 payments, and how much you'd like to pay. Please see below for more details on how to answer those questions.

- 1) **Estimate of total tax liability for 2023:** this is an **estimate** of how much you owe the federal government **in total**, not including what has already been pulled out of your W2s if you have W2s. To get a *rough estimate* of what this number might be, you can use a tax liability calculator like this one: www.calculator.net/tax-calculator.html. If you use this calculator, "Regular Taxes" will be your tax liability. This is what you should expect line 24 on your 1040 to be, so you can also use a previous tax return to estimate this if your income is similar. Pisgah Legal Services cannot help you determine this amount. If the IRS finds that the estimate wasn't reasonable, the extension will be null and void.
- 2) **Total 2023 payments / Amounts previously paid for current tax year:** this is an **estimate** of the taxes you've already paid to the federal government. If you have W2s, this is the total of what you paid in federal taxes in box 2. If you are self-employed and you have been paying quarterly tax payments, you would enter that amount here. If you use the calculator above, "Tax Pre-payments" will be your amount previously paid. This is what you should expect line 33 (excluding Schedule 3, line 10) on your 1040 to be, so you can also use a previous tax return to estimate this if your income is similar. Pisgah Legal Services cannot help you determine this amount. If the IRS finds that the estimate wasn't reasonable, the extension will be null and void.
- 3) **Amount you're paying / Amount paid with extension:** even if you file an extension, you will begin owing money on interest starting on April 15th if you do not pay. If you would like to make a payment with your extension, you can enter that here. You do not have to make a payment for your extension to go through.

Instructions for Mailing in Form 4868

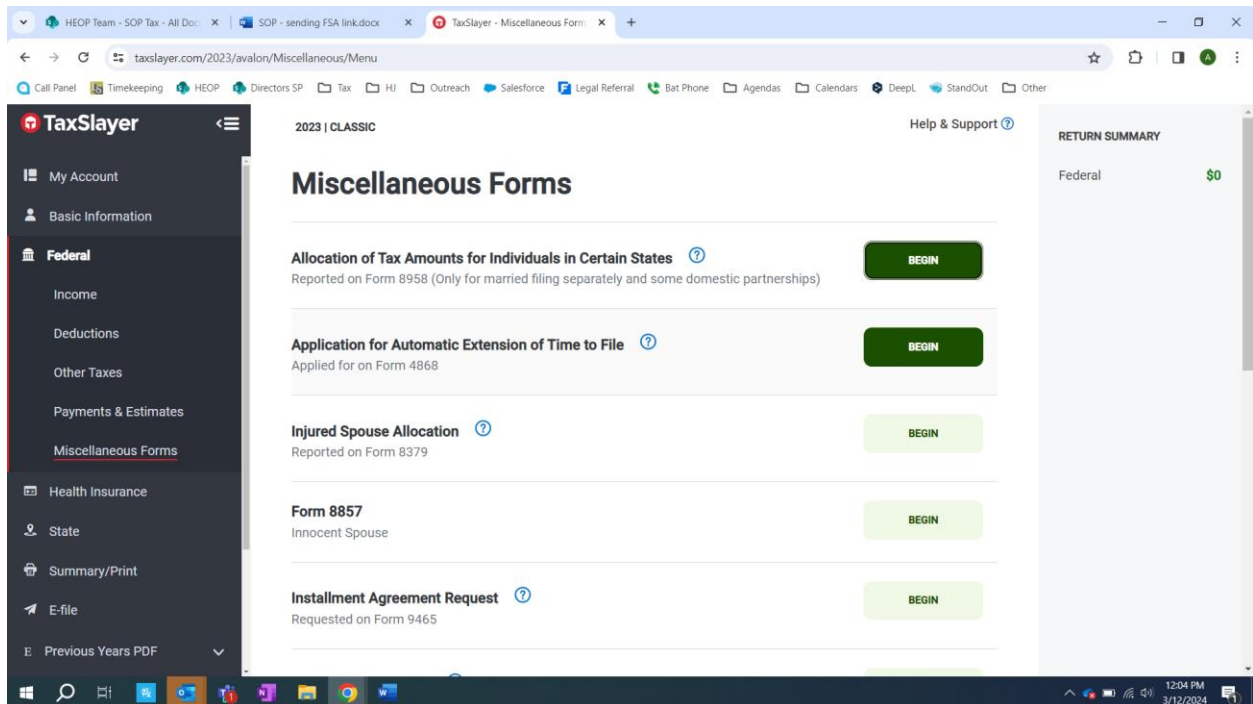
- 1) Read the full instructions on the form.
- 2) Fill out Part I with your name and information.
- 3) Fill out Part II using the definitions of each section above.
- 4) Mail the form to the following address, depending on if you are including a payment or not:
 - a. If you are including a payment, send the form to:
Internal Revenue Service
PO Box 1302

Charlotte, NC
28201-1302

- b. If you are NOT including a payment, send the form to:
Department of the Treasury, Internal Revenue Service Center
Austin, TX
73301-0045

Instructions for E-Filing an Extension

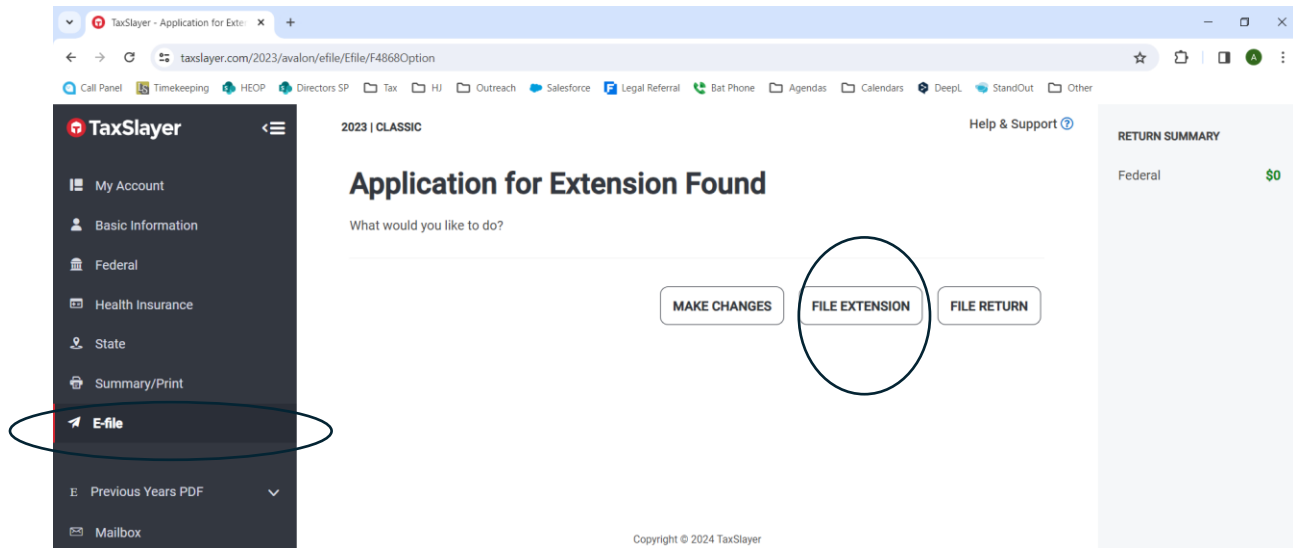
- 1) You can use the Pisgah Legal Services free FSA link to create an account to file your extension: To receive this link, please email fsasupport@pisgahlegal.org and we will send it to you.
- 2) Create an account with TaxSlayer, and click “Get Started” to begin your tax return. It will ask you to fill out some consent forms, and will ask if you want to pay for the premium account. Be sure to click “Continue with Classic.”
- 3) Fill out your basic information, and say “no” to any premium offers.
- 4) Once you’ve filled out your basic information, you’ll see a menu on the left-hand side. Click “Federal,” click “Miscellaneous Forms,” and then on the main screen, click the second option: “Application for Automatic Extension of Time to File.”



- 5) These are the 3 sections you need to fill out: your tax liability, how much you've already paid into your taxes for 2023, and how much (if any) you want to pay with your extension. Fill this out using the definitions of each section above and click "Continue."

The screenshot shows the TaxSlayer website interface. The browser address bar displays 'taxslayer.com/2023/avalon/miscellaneous/MiscForms/F4868'. The main content area is titled '2023 | CLASSIC' and features a step indicator '3 E-file your extension [Learn more](#)'. Below this, there are two informational links: 'For more information on making a payment with your extension click here: ?' and 'For more information on filing your STATE extension click here: ?'. The 'Tax Liability' section includes a text box for the total tax liability. The 'Amounts previously paid for current tax year' section includes a text box for taxes already paid. The 'Amount Paid with Extension' section includes a text box for the amount to be paid with the extension and a checkbox for 'I was out of the country.' On the right side, a 'RETURN SUMMARY' panel shows 'Federal' with a value of '\$0'. The left sidebar menu is open, with 'Federal' selected under the 'Federal' category. The Windows taskbar at the bottom shows the date as 3/12/2024 and the time as 12:05 PM.

- 6) Go back to the left-hand menu, and click "E-file," then on them main page click "File extension."



- 7) Review your information, and enter a PIN (you can use your zip code so it's easy to remember).
- 8) When you've filed your extension, you should see the following screen – then you're all set!

