



Tax Extension Filing Checklist

To ensure we can file your tax extension accurately and on time, please gather the following information and documents:

- ☐ Valid government-issued ID
- ☐ Social Security Number (SSN) or Employer Identification Number (EIN)
- ☐ Copy of your previous year's tax return (optional but helpful)
- ☐ Any documents you've already prepared for this year's taxes
- ☐ Estimate of your total income and deductions for the year
- ☐ Estimate of tax owed or refund due
- ☐ Any IRS or state tax notices you've received

For help or questions, contact WealthCrest Financial at support@wealthcrest-financial.com or call (972) 440-5152.

Website: www.WealthCrest-Financial.com