

Trudy C. Durant and Associates LLC

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EXTENSION WORKSHEET FOR THE TAX YEAR 2023

First Name and Initial	Taxpayer's Last Name	Social Security #	Occupation	Date of Birth
First Name and Initial	Spouse's Last Name	Social Security #	Occupation	Date of Birth

Home Address		City, State and Zip		
Resident State	Home #	Work #	Cell #	
Email Address (Required)			Preferred Contact Tel No.	

WAGE INFORMATION: TOTAL ALL W-2S AND, IF MARRIED, REPORT TAXPAYER (T) AND SPOUSE (S) SEPARATELY			
		T	S
TOTAL FEDERAL WAGES	BOX #1		
TOTAL FEDERAL WITHHOLDING	BOX #2		
RESIDENT STATE WITHHOLDING	BOX #17		
OTHER STATE WITHHOLDING	BOX #17		
TOTAL CITY WITHHOLDING	BOX #19		

INTEREST INCOME (1099-INT)	DIVIDEND INCOME (1099-DIV)	STOCK SALE PROCEEDS (1099-B)
NON EMPLOYEE COMP (1099-MISC)	ROYALTY INCOME	COST OF STOCKS SOLD (IF AVAIL)
SOCIAL SECURITY BENEFITS REC'D	UNEMPLOYMENT COMPENSATION	Do You Have A Foreign Bank Acct?
		YES NO
IRA DISTRIBUTION AMTS? (1099-R)	PLEASE INDICATE IF ROLLOVER	Is the Balance Over 10K?
	YES NO	YES NO
IRA CONTRIBUTION AMOUNTS	PLEASE INDICATE ROTH OR TRADITIONAL IRA	
	ROTH TRAD	
FEDERAL EST TAX PAYMENTS	STATE EST TAX PAYMENTS	

PLEASE LIST ALL STATES WORKED IN DURING 2023

COMMENTS OR QUESTIONS: