

Form **4868**

Department of the Treasury  
Internal Revenue Service

**Application for Automatic Extension of Time  
To File U.S. Individual Income Tax Return**

Go to [www.irs.gov/Form4868](http://www.irs.gov/Form4868) for the latest information.

OMB No. 1545-0074

**2023**

There are three ways to request an automatic extension of time to file a U.S. individual income tax return.

1. You can pay all or part of your estimated income tax due and indicate that the payment is for an extension using your bank account; a digital wallet such as Click to Pay, PayPal, and Venmo; cash; or a credit or debit card. See *How To Make a Payment*, later, and [www.irs.gov/Payments](http://www.irs.gov/Payments) for more information.
2. You can file Form 4868 electronically by accessing IRS e-file using your tax software or by using a tax professional who uses e-file.
3. You can file a paper Form 4868 and enclose payment of your estimate of tax due (optional).



**It's Convenient,  
Safe, and Secure**

IRS e-file is the IRS's electronic filing program. You can get an automatic extension of time to file your tax return by filing Form 4868 electronically. You'll receive an electronic acknowledgment once you complete the transaction. Keep it with your records. Don't mail in Form 4868 if you file electronically, unless you're making a payment with a check or money order. See *Pay by Check or Money Order*, later.

Complete Form 4868 to use as a worksheet. If you think you may owe tax when you file your return, you'll need to estimate your total tax liability and subtract how much you've already paid (lines 4, 5, and 6 below).

Several companies offer free e-filing of Form 4868 through the Free File program. For more details, go to [www.irs.gov/FreeFile](http://www.irs.gov/FreeFile).



**Pay Electronically**

You **don't** need to file Form 4868 if you make a payment using our electronic payment options. The IRS will automatically process an extension of time to file when you pay part or all of your estimated income tax electronically. You can pay online or by phone. See *Making Payments Electronically*, later.



**E-file Using Your Tax Software  
or Through a Tax Professional**

Refer to your tax software package or tax preparer for ways to file electronically. Be sure to have a copy of your 2022 tax return—you'll be asked to provide information from the return for taxpayer verification. If you wish to make a payment, you can pay by electronic funds withdrawal or send your check or money order to the address shown in the middle column under *Where To File a Paper Form 4868*, later.



**File a Paper Form 4868**

If you wish to file on paper instead of electronically, complete the Form 4868 below and mail it to the address shown under *Where To File a Paper Form 4868*, later.

For information on using a private delivery service, see *Private Delivery Services*, later.

**Note:** If you're a fiscal year taxpayer, you must file a paper Form 4868.

**General Instructions**

**Purpose of Form**

Use Form 4868 to apply for 6 more months (4 if "out of the country" (defined later under *Taxpayers who are out of the country*) and a U.S. citizen or resident) to file Form 1040, 1040-SR, 1040-NR, or 1040-SS.

**Gift and generation-skipping transfer (GST) tax return (Form 709).** An extension of time to file your 2023 calendar year income tax return also extends the time to file Form 709 for 2023. However, it doesn't extend the time to pay any gift and GST tax you may owe for 2023. To make a payment of gift and GST tax, see Form 8892. If you don't pay the amount due by the regular due date for Form 709, you'll owe interest and may also be charged penalties. If the donor died during 2023, see the instructions for Forms 709 and 8892.

**Qualifying for the Extension**

To get the extra time, you must:

1. Properly estimate your 2023 tax liability using the information available to you,
2. Enter your total tax liability on line 4 of Form 4868, and
3. File Form 4868 by the regular due date of your return.



**CAUTION** Although you aren't required to make a payment of the tax you estimate as due, Form 4868 doesn't extend the time to pay taxes. If you don't pay the amount due by the regular due date, you'll owe interest. You may also be charged penalties. For more details, see *Interest and Late Payment Penalty, later*. Any remittance you make with your application for extension will be treated as a payment of tax.

You don't have to explain why you're asking for the extension. We'll contact you only if your request is denied.

Don't file Form 4868 if you want the IRS to figure your tax or you're under a court order to file your return by the regular due date.

DETACH HERE

Form **4868**

Department of the Treasury  
Internal Revenue Service

**Application for Automatic Extension of Time  
To File U.S. Individual Income Tax Return**

For calendar year 2023, or other tax year beginning , 2023, and ending , 20

OMB No. 1545-0074

**2023**

Part I Identification			Part II Individual Income Tax	
1 Your name(s) (see instructions) Eric Daley and Agata Gruza			4 Estimate of total tax liability for 2023 . . . . . \$	80,000
Address (see instructions) 13824 Long Shadow Dr			5 Total 2023 payments . . . . .	70,000
City, town, or post office Manor			6 <b>Balance due.</b> Subtract line 5 from line 4. See instructions . . . . .	10,000
State T X			7 Amount you're paying (see instructions) . . . . .	10,000
ZIP code 78653			8 Check here if you're "out of the country" and a U.S. citizen or resident. See instructions . . . . .	<input type="checkbox"/>
2 Your social security number 467-51-0575	3 Spouse's social security number 045-08-7728		9 Check here if you file Form 1040-NR and didn't receive wages as an employee subject to U.S. income tax withholding . . . . .	<input type="checkbox"/>

For Privacy Act and Paperwork Reduction Act Notice, see instructions later.

Cat. No. 13141W

Form **4868** (2023)

1015

✓ Track Your Expenses...

- Auto/Travel
- Business
- Charities
- Clothing
- Dependent Care
- Education
- Entertainment
- Food
- Home
- Insurance
- Medical/Dental
- Savings
- Taxes
- Utilities
- Other

April 15 '2023

United States Treasury

Ten thousand

Duplicate is produced using soy-based materials. Images may appear light.

BAL. FOR'D	
ITEM AMOUNT	10,000
BALANCE	
DEPOSIT	
FOR'D	

TAX DEDUCTIBLE ITEM

Memo

2023 TOW 4868



For enhanced security your account number will not be printed on this copy

NOT NEGOTIABLE

DUP-9

4/26/2024

Us Treasury #1015

\$10,000.00



Completed 4/26/2024

### Transaction info

Description	Transaction date	Transaction time	Type
Electronic Check Us Treasury Irs #1015	4/26/2024	4:00 a.m.	Withdrawal

### Merchant Info

Merchant Category

Taxes 

 <https://home.treasury.gov/>

- Other Investments/Retirement accounts and U.S. Bank Beneficiary accounts are not included in asset total.
  - Your account totals may include the value of assets held at U.S. Bancorp Investments and assets and/or insurance policies not held at U.S. Bancorp Investments. Held-away asset information is provided only for informational purposes only, has not been verified, and may not reflect current market values. We obtained it from sources believed reliable, but we do not guarantee its accuracy or completeness. Certain held-away assets and policies may reflect zero market value, while others may reflect value where no actual market value exists. Assets held-away may not be covered by SIPC. This information is not a replacement for account documents that you receive from the company holding the asset(s) (including trade confirmations, accounts statements, or 1099 forms.) For more information, please see the Holdings section of the online site or U.S. Bancorp Investments mobile app summarizing your assets and/or policies not held at U.S. Bancorp Investments.
- U.S. Bank, U.S. Bancorp Investments, U.S. Bancorp Advisors, and their representatives do not provide tax or legal advice. Your tax and financial situation is unique. You should consult your tax and/or legal advisor for advice and information concerning your particular situation.
  - The Sweep account balance is included in the associated account's available balance.
  - The Current Balance may not be the final payoff amount. Please contact us for payoff amount.
  - If you do not pay the Minimum Payment due by the Payment Due Date, you may be subject to late charges which will appear