

DIRECT DEPOSIT/WITHDRAWAL IS ELECTIVE:

Direct Deposit my refund into my: Checking Savings

Electronic Withdrawal of my balance due from: Checking Savings

Date requested for withdrawal _____

I do not want direct deposit of my refund.

I do not want electronic withdrawal of my payment.

Please refer to **your CHECK** for the correct number See example below ↓

Please Attach Voided Check to this Form.

DO NOT USE A DEPOSIT SLIP

Sample Name		Check#1234
Sample Address	Example Only	
Sample City, State, Zip		
Pay to the order of _____	\$ _____	
		Dollars
Bank Name		
Bank Address		
Memo _____		
\: 121112587\:	1234	123456789
(Routing #)	(Check#)	(Account#)

Bank Name: _____

Routing# _____ Account# _____

I AGREE that I will verify with my Financial Institution that this will be acceptable with the above listed Account and Routing numbers:

Client Signature _____

Date _____

MANDATORY ELECTRONIC FILING:

1. It is now **Mandatory** for us to file your tax returns Electronically. *Certain exclusions will apply to some taxpayers.
2. *Some circumstances will exclude certain taxpayers from being Electronically filed. In such a case, there will be an e-file Opt-Out Form (8454) that must be filed with a paper return. Should **you choose** not to have your return filed electronically, you must also file Form (8454) with your paper return.

INFORMATION REGARDING E-FILING:

1. We file your return via computer modem. You do not file a paper return with any taxing authority. You will receive a paper copy of the returns for your files.
2. After your return is processed, you will be called to come into our office to pay for your completed return before your returns can be transmitted. *If you are filing a joint return, both spouses must be present to sign.*
3. IRS Form 9325 states that refunds from **electronically** filed returns should be received *approximately* three (3) weeks after acceptance.
4. You will be sent a letter notifying you of the date of acceptance.
5. I have **shown* all taxpayer, spouse and dependent Social Security Cards** to my preparer for verification of names and numbers as reported to the Social Security Administration.