

Client: _____ Phone #: _____

In the case of a refund, please select the return method you prefer: ****Please note that in the case that direct deposit does not go through, your refund will automatically switch to paper check by mail****

Direct Deposit Paper Check by Mail Bank Product

(tax preparation fee comes directly out of your refund. Additional fees and paperwork apply)

<u>For Direct Deposit</u>	
Routing #	
Account #	
Account Type	
<input type="radio"/> Checking	<input type="radio"/> Savings

Did you receive the 3rd economic stimulus check? Yes No

If yes, in what amount? \$ _____

Did you receive any Advance Child Tax Payments? (Letter 6419)

If yes, in what amount? \$ _____ Yes No

Due to the Coronavirus, we have a new system for picking up your tax return and documents. Please select one of the following options:

Schedule a time to pick up your return from the office. ****This can be done when we call to notify you that your tax return is ready to be signed and picked up or you can visit our website to schedule a time.**

Electronic copy of your tax return as well as electronic signature through ShareFile and HelloSign. (See Website for Instructions) Email:

By Mail: We will send you your documents as well as a copy of your tax return by mail. **An additional \$15 fee will apply to cover our time as well as shipping expenses.**

Signed _____ Date _____