

2024 E-FILE & DIRECT DEPOSIT PREFERENCE

(Please return this form with your tax preparation documents)

Client Name: _____

- Do you want to have your 2024 Income Tax Return(s) electronically filed?

YES

NO

- Do you want to have your 2024 Income Tax Refund(s) direct deposited?

YES

NO

Please provide the following information in order to direct deposit any refunds:

- **Use Bank Account information on file:** **YES** **NO**

New or Updated Account Information:

- Financial Institution: _____

- Routing Number: _____

- Account Number: _____

- **Type of Account (circle one):** **CHECKING** **SAVINGS**

WE MUST RECEIVE YOUR INFORMATION BY MARCH 21, 2025 IN ORDER TO COMPLETE YOUR RETURN IN A TIMELY MANNER. INFORMATION RECEIVED AFTER THAT DATE WILL CAUSE YOUR RETURN TO BE EXTENDED AND COMPLETED AFTER THE APRIL 15TH DUE DATE.