

2025 E-File, Direct Deposit & Pick Up or Mail Preference

(Please return this form with your tax preparation documents & **please PRINT LEGIBLY**)

Client Name: _____

Do you want to have your 2025 Income Tax Return(s) electronically filed? Yes No

*** As of 9/30/2025 the U.S. Treasury will no longer mail paper checks for tax refunds, therefore refunds **MUST** be direct deposited. If you have not had your prior refunds direct deposited please provide the information below.

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

Pick-Up or Mail Tax Return Preference:

If you will be out of town between February 15th and April 15th, please provide the mailing address of where to send the return(s) along with a phone number or email where you can be reached.

Address: _____

Phone: _____

When your return(s) are completed please indicate below how you would like to receive your return and any original tax documents provided.

_____ Call for Pick Up Phone number(s): _____

_____ **Mailed via UPS (United Parcel Service)** - Additional fees will be added to your invoice. Returns are sent UPS Ground in order to keep fees at a minimum. After April 10th returns are sent UPS Next Day Air to ensure they are delivered by the due date.

_____ **Mailed via the USPS (United States Postal Service)** - Additional fees will be added to your invoice however, we cannot guarantee date of delivery nor will we be able to track your package.

We must receive your information by **March 20, 2026** in order to complete your returns in a timely manner. Information received after this date will cause your return to be extended and completed after April 15th.