2026 E-File, Direct Deposit, & Pick-Up or Mail Preference

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

Client Name: _____

Do you want to have your 2026 Income Tax Return(s) electronically filed (circle one)? Yes No

**** As of 9/30/2025 the US 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 Bank 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 and/or email where you can be reached.

Address: _____

Phone or E-Mail: _____

When your tax 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 8th 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 15,2027 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.