

Preparer - Enter on Screen Contact

Tax matters person (Indicate which spouse handles tax return related questions) (Blank = Both, T = Taxpayer, S = Spouse) _____ [8]

Taxpayer email address _____ [9]

Spouse email address _____ [10]

Taxpayer

Spouse

Fax telephone number _____ [11] _____ [20]

Mobile telephone number _____ [12] _____ [21]

Mobile telephone #2 number _____ [13] _____ [22]

Pager number _____ [14] _____ [23]

Other: _____ [15] _____ [24]

 Telephone number _____ [16] _____ [25]

 Extension _____ [17] _____ [26]

Preferred method of contact: _____ [18] _____ [27]
 Email, Work phone, Home phone, Fax, Mobile phone, Mobile phone #2

NOTES/QUESTIONS:

Per IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number, and type of account below. If you would like to have a refund direct deposited into or a balance due debited from your bank account(s), please enter information in the fields below. Note that electronic funds will be withdrawn only from the primary account listed below. In accordance with Executive Order 14247, the IRS has phased out paper checks for refunds and payments as of September 30, 2025. Failure to provide bank information will delay IRS processing of refunds.

Mark to verify all accounts listed below have been reviewed, updated as needed, and are correct. __ [1]

Primary account:

Financial institution routing transit number _____ [6]

Name of financial institution _____ [7]

Your account number _____ [8]

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) __ [9]

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) __ [12]

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __ [13]

Enter the maximum dollar amount, or percentage of total refund Dollar _____ [14] or Percent (xxx.xx) _____ [15]

Secondary account #1:

Financial institution routing transit number _____ [24]

Name of financial institution _____ [25]

Your account number _____ [26]

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) __ [27]

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) __ [30]

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __ [31]

Enter the maximum dollar amount, or percentage of total refund Dollar _____ [16] or Percent (xxx.xx) _____ [17]

Secondary account #2:

Financial institution routing transit number _____ [32]

Name of financial institution _____ [33]

Your account number _____ [34]

Type of account (1 = Savings, 2 = Checking, 3 = IRA*) __ [35]

Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) __ [38]

Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __ [39]

Enter the maximum dollar amount, or percentage of total refund Dollar _____ [18] or Percent (xxx.xx) _____ [19]

*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

NOTES/QUESTIONS: