



Electronic Filing

Electronic Filing: Please enclose all copies of your current year Forms W-2

Electronic filing is the means by which your return is transmitted directly to the IRS. Electronic filing is the only filing method that provides you with acknowledgement that the IRS has received your return and is processing it. If you are to receive a refund and use direct deposit with electronic filing, you will normally receive your refund in about 2 weeks.

Please note that not all returns qualify for electronic filing under IRS rules.

Yes **No**

If you qualify for electronic filing, would you like to file the return electronically with the IRS?

Would you like your return prepared and filed electronically when you have a balance due?

Would you like your federal return filed electronically only if your refund is greater than a certain minimum dollar amount?

If Yes, enter the amount here.

If you qualify, would you like to file your state return electronically?

If you file more than one state, do you want to file all of them electronically?

The IRS has implemented a program to allow taxpayers to e-file without mailing a signature document. In order to participate, please provide a 5-digit self-selected Personal Identification Number (PIN).

Self-selected PIN:

Taxpayer PIN _____

Spouse PIN _____

Refund Anticipation Loan:

Refunds take from 10 - 21 days for normal electronic processing. You may receive your refund sooner by electing a Refund Anticipation Loan. There is an additional charge for this service.

If you are to receive a refund, do you want to receive a Refund Anticipation Loan?

Yes **No**

Federal

State



Direct Deposit and Electronic Withdrawal Account Information:

The IRS and certain states allow refunds to be deposited directly into your financial institution account, regardless of the means used to file the return. For balance due returns to be filed electronically, the IRS and many states allow the entire amount due to be paid using electronic withdrawal. If you would like to have your refund deposited directly into your account or pay a balance due by using an electronic withdrawal, please complete the following information. If the account should be used for a refund anticipation loan, please mark both the refund anticipation loan box and either the checking or trad. savings box.

(To properly file your return, please attach a voided check or a copy of a monthly statement for your account.)

Owner of account ... Taxpayer Spouse Joint
Select type of account ... Checking Archer MSA Savings Trad. Savings Coverdell Ed.Savings IRA Savings Refund Anticipation Loan HSA Savings

Name of financial institution

Financial Institution Routing Transit Number (if known)
(Use the routing number from a check, NOT a deposit slip. They can be different.
The Routing Transit Number must begin with 01 through 12 or 21 through 32.)

Your account number

Do you want your refund deposited directly into your financial institution account?
Do you want to use any of your refund to purchase any Series I U.S. Savings Bonds?
If you are filing a balance due return electronically, do you want to pay the amount due using an electronic withdrawal?
What amount of your refund, if not the entire refund, do you want to use to purchase Series I U.S. Savings Bonds?
What amount do you want withdrawn if not the entire balance due?

Yes No grid for questions

What date do you want the withdrawal done? (Mo/Da/Yr)

Owner of account ... Taxpayer Spouse Joint
Select type of account ... Checking Archer MSA Savings Trad. Savings Coverdell Ed.Savings IRA Savings Refund Anticipation Loan HSA Savings

Name of financial institution

Financial Institution Routing Transit Number (if known)
(Use the routing number from a check, NOT a deposit slip. They can be different.
The Routing Transit Number must begin with 01 through 12 or 21 through 32.)

Your account number

Do you want your refund deposited directly into your financial institution account?
Do you want to use any of your refund to purchase any Series I U.S. Savings Bonds?
If you are filing a balance due return electronically, do you want to pay the amount due using an electronic withdrawal?
What amount of your refund, if not the entire refund, do you want to use to purchase Series I U.S. Savings Bonds?
What amount do you want withdrawn if not the entire balance due?

Yes No grid for questions

What date do you want the withdrawal done? (Mo/Da/Yr)