

Bank Information Form

For Use in Preparing the 2023 Tax Return

I/We do NOT want to use Direct Deposit or Direct Debit _____ (please Initial)
PLEASE NOTE: Direct Deposit will give you access to your refund faster than a paper check.

TAPE a voided check here if you
would like to have direct deposit or direct debit

Per IRS rules, you MUST attach a voided check **OR** include a notice from the bank with the routing (ABA) and account number.

Please check off all acceptable options, complete section below and sign:

_____ Refunds should be deposited directly into our bank account

_____ Any money owed for federal taxes should be taken directly out of my/our bank account*

_____ Any money owed for state taxes should be taken directly out of my/our bank account*

_____ 2024 tax estimates should be taken directly out of my/our bank account

_____ 2024 state tax estimates should be taken directly out of my/our bank account

Institution name: _____ Account type: _____ Checking _____ Savings

Taxpayer: _____
(Signature) (Print name) (Date)

Spouse: _____
(Signature) (Print name) (Date)

*Daytime phone number required for direct debit payments: _____