ATS Tax & Financial Solutions, Inc.
1075 First Street, Ste. 6 (upstairs)
Benicia, CA 94510
Phone: 707.745.1040 Fax: 707.745.0281
http://www.taxangels.com
Please bring in with a ***VOIDED CHECK***

DIRECT DEPOSIT

DIRECT DEPOSIT my refund into my: ◯ Checking ◯ Savings
Electronic Withdrawal of my balance due from: ◯ Checking ◯ Savings

Date requested for withdrawal:

I DO NOT WANT DIRECT DEPOSIT OF MY REFUND: ◯

I DO NOT WANT ELECTRONIC WITHDRAWAL OF MY PAYMENT: ◯

Bank Name: Routing Number: Account Number:

I AGREE that I will verify with my Financial Institution that this will be acceptable with the above listed Account and Routing Numbers

Signature: Date:

MANDATORY ELECTRONIC FILING:

1. It is now MANDATORY for us to file your returns electronically. Certain exclusions will apply to some taxpayers.
2. Some circumstances will exclude certain taxpayers from being electronically filed. In such a case, there will be an e-file Opt-Out Form (8454) with your paper return

INFORMATION REGARDING E-FILING

1. We file your return via computer. You do not file a paper return with any taxing authority. You will receive a copy of the return for your files.
2. After your return is processed, you will be called to come into our office to pay for your completed return before your returns can be transmitted. If you are filing a joint return, both spouses must be present to sign.
3. IRS Form 9325 states that refunds from electronically filed returns should be received approximately three(3) weeks from acceptance.
4. You will be sent a letter notifying you of the date of acceptance.
5. I have shown all taxpayer, spouse and dependent Social Security Cards to my preparer for verification of names and numbers as reported to the Social Security Administration