

2025 Tax Return – Refund & Payment Preferences (One-Page Sign-Off)

Starting **September 30, 2025**, the federal government is phasing out **paper refund checks**, so most federal refunds will be issued **electronically**. To prevent delays, please choose how you want your refund delivered and how you want any payments handled (if you owe).

Printed Name: _____

Spouse Name: _____

1) FEDERAL REFUND (Choose one)

- ☐ Direct deposit to my bank account (recommended)
☐ Other approved electronic method (if available): _____

2) FEDERAL PAYMENT (Only if you owe) — Choose one

- ☐ Auto-draft from my bank account
☐ I will pay the IRS myself (Direct Pay / EFTPS / card / other)

If choosing auto-draft, draft date:

- ☐ When the return is filed
☐ April 15, 2026

3) BANKING INFORMATION (Required for federal direct deposit)

Primary Account (Refunds + payments come from this account)

Bank Name: _____

Routing #: _____

Account #: _____

☐ Checking ☐ Savings

4) ANSWERING IRS NOTICES (Insurance For 2025 Tax Year When Prepaid)

- ☐ Accept (Flat \$125 Fee Will Be Added To Your Tax Return Preparation Invoice)
☐ Decline (Minimum \$295 Retainer Will Be Collected Upon Engagement And Applied To Invoice)

CLIENT AUTHORIZATION (Signature Required)

By signing, I confirm the information above is accurate and I authorize WTA to file my 2025 tax return using the preferences selected on this form.

Client Signature : _____ Date: _____

Spouse Signature: _____ Date: _____