

# Refunds and Payment Options

**Your name(s)** \_\_\_\_\_

All tax returns will be e-filed unless for technical reasons we are unable to, or you have opted out.

**Please check all the boxes that apply in items 1–5:**

## 1. Overpayments

Please apply some/all of my refund to next year's estimated tax payments. 1ST 2ND 3RD ALL

I prefer to receive a refund. **If you checked the All box skip Step 2**

## 2. Faster Refunds

I want the IRS and State to deposit my refund directly into my bank account. See 4. below.

No, I prefer to receive a check.

## 3. Balance Due

### If there were a balance due:

Yes, I want to pay my taxes via electronic funds withdrawal on Transmittal day (1–3 days after we receive your signed documents).

No, I don't want to. I will pay by check with a voucher or I will pay Online [www.irs.gov/payments/direct-pay](http://www.irs.gov/payments/direct-pay)

## 4. Distribute your Federal Refund

(into 1, 2 or 3 accounts, or 2 accounts + 1 IRA)

**Account 1.** \_\_\_\_% BANK'S NAME > \_\_\_\_\_

BANK ROUTING NO. >

(9-DIGIT NUMBER ON BOTTOM LEFT CORNER OF YOUR CHECK, OR ASK YOUR BANK)

BANK ACCOUNT NO. >

CHECKING SAVINGS Please Initial

**Account 2.** \_\_\_\_% BANK'S NAME > \_\_\_\_\_

BANK ROUTING NO. >

(9-DIGIT NUMBER ON BOTTOM LEFT CORNER OF YOUR CHECK, OR ASK YOUR BANK)

BANK ACCOUNT NO. >

CHECKING SAVINGS

2020 IRA

2021 IRA

## 5. NEW

### Identification No.

As an additional means of validating a taxpayer's identification, AL, AZ, CA, CO, KS, NM, NY, OH, VT, WI require driver license or state identification on state returns. Failure to provide this info will cause delays in processing refunds.

Yes, I have a driver license / state identification card:

**Taxpayer** State \_\_\_\_\_

Exp Date \_\_\_\_\_ ID Num \_\_\_\_\_

Issue Date \_\_\_\_\_ Doc Num (NY ONLY) \_\_\_\_\_

**Spouse** State \_\_\_\_\_

Exp Date \_\_\_\_\_ ID Num \_\_\_\_\_

Issue Date \_\_\_\_\_ Doc Num (NY ONLY) \_\_\_\_\_

No, I do not have a driver license / state identification card. (e.g. minor, foreign resident, etc.)

## 6. Fee Payment for Tax Preparation

**All fees must be paid prior to e-filing**

CREDIT CARD

CHECK DATE SENT: \_\_\_\_\_

PAYPAL (Go to [www.judakallus.com](http://www.judakallus.com) click "make a payment")

ZELLE (Use [judakallus@aol.com](mailto:judakallus@aol.com))

CASH

**X**

SIGNATURE

PRINT NAME

CARD NUMBER

SECURITY CODE

EXP. DATE

**BILLING ADDRESS FOR CREDIT CARD**

SAME AS HOME

SAME AS BUSINESS

OTHER BILLING ADDRESS, PLEASE PROVIDE BELOW:

BILLING ADDRESS

CITY

STATE / ZIP