

# TAX EXPRESS REFUND E-FILING INFO SHEET

QUESTIONS: Call (631) 473-2329 or (800) 866-2003 (outside of NYS)

IRS no longer follows a set schedule for direct deposits, however, refunds with direct deposit are usually received within 21 days of IRS acceptance. Checks are 1 week later. **RETURNS WITH EARNED INCOME CREDIT OR ADDITIONAL CHILD TAX CREDIT WILL PROBABLY NOT BE FUNDED BY THE IRS BEFORE FEBRUARY 27<sup>TH</sup>.** NYS refunds take longer than the IRS refunds – Generally NY state direct deposits take 21-28 days from date of acceptance.

Please provide contact phone # and email address: Daytime # \_\_\_\_\_  
Cell # \_\_\_\_\_ Email address: \_\_\_\_\_

IRS requires all e-filed returns to include information from taxpayer/spouse driver's license or state issued photo id#. Please include a LEGIBLE copy of your license or complete below. Returns cannot be filed without this information – call the office to discuss if you do not have valid ID.

Taxpay ID#: \_\_\_\_\_ State of issue \_\_\_\_\_ Issue Date: \_\_\_\_\_ Exp date: \_\_\_\_\_

Spouse ID#: \_\_\_\_\_ State of issue \_\_\_\_\_ Issue Date: \_\_\_\_\_ Exp date: \_\_\_\_\_

**FOR NYS RETURNS – IN ADDITION ABOVE, PLEASE ENTER THE DOCUMENT # FROM YOUR LICENSE OR STATE ISSUED ID (its 8 to 10 letters or numbers located at either bottom right hand of license or back of license).**

TAYPAYER DOCUMENT # \_\_\_\_\_ SPOUSE #: \_\_\_\_\_

**DATE OF BIRTH MUST BE PROVIDED FOR TAXPAYER, SPOUSE AND ALL DEPENDENTS LISTED ON RETURN – This information is provided to the IRS so please be accurate to avoid delays.**

Name	D/O/B	Name	D/O/B
_____	____/____/____	_____	____/____/____
_____	____/____/____	_____	____/____/____
_____	____/____/____	_____	____/____/____
_____	____/____/____	_____	____/____/____

**FILING FEES: \$25.00 FEDERAL \$35.00 FEDERAL/STATE ADDITIONAL \$10 IF FAXED**

- Check or money order enclosed
- I authorize you to charge my credit/debit card in the amount of \$ \_\_\_\_\_

Credit card # \_\_\_\_\_ Exp Date \_\_\_\_\_ CSV Code \_\_\_\_\_

Circle one Visa, M/C, Amex, Discover, Bank debit cards accepted ONLY if has VISA or M/C logo)

Name on card: \_\_\_\_\_ Signature: \_\_\_\_\_

Address: \_\_\_\_\_

**RETURN ALL PAPERWORK TO TAX EXPRESS REFUND SERVICE (see back of E-file Authorization Form for complete details)**

## MAIL OR OVERNIGHT PACKAGES

**TAX EXPRESS REFUND SERVICE  
UNIT 382  
5507 NESCONSET HWY, SUITE 10  
MOUNT SINAI, NY 11766**

## FAX RETURNS AND SUPPORTING DOCUMENTS TO: 631-476-8688

While we cannot immediately notify you by phone or e-mail that your fax has been received, if you provide us with an e-mail address, we will notify you within 24 hours that your return has been received.

## STEP 1: Qualifications for Electronic Filing

Your tax returns must be COMPLETE, LEGIBLE, and for the CURRENT TAX year only. Name, Date of Birth and Social Security numbers for all persons on the tax return must match exactly with their most recent Social Security card as this information is verified by the IRS. Also many tax credits are based on birth dates, which are also verified by the IRS. Year of birth for all persons on the tax return must be listed on the e-filing info sheet

## STEP 2: Complete and sign IRS E-FILE Signature Authorization Form (Form 8879)

1. Complete the heading with name(s), social security number(s) and address. In the space provided, please include a phone number where we can easily reach you. ***If you fail to provide us with a current working phone number and a customer service issue arises, your refund could be delayed.***
2. If you are getting a refund, enter the amount of the expected refund .
3. If you want your refund direct deposited, check box and enter your direct deposit information in the "REFUND" section of your 1040 tax return (this section is found above the signature line on your tax return). **ENTER INFORMATION CAREFULLY, INCORRECT INFORMATION CAN LEAD TO DELAYS IN YOUR REFUND!!** If you fail to enter this information, we will submit the return to the IRS as a "check to home", which takes approximately 1 week longer. Once a return has been transmitted to the IRS we are unable to change any direct deposit information - we strongly suggest you review information carefully prior to submitting.

*If you would prefer to have a check mailed to you, check the box indicating you want your refund mailed. (Your refund will take about a week longer to receive).*

## STEP 3: Complete e-filing info sheet - provide phone numbers and provide date of birth for anyone listed on tax return.

## STEP 4: Items to return to Tax Express

1. Completed, legible federal tax return and state return (if applicable). It is the responsibility of the taxpayer to file a complete and accurate return. Keep copies of your return and all supporting documents. Tax Express does not mail your original tax forms back to you.
2. The original completed and signed IRS E-file Authorization Form and State Electronic Form (if applicable).
3. The completed e-filing info sheet
4. All W-2's, 1099's and SSA Forms which would normally accompany your tax return. This includes 1099-R, 1099-G, 1099-Misc and W-2G as well as any other forms or schedules relating to your return.

## STEP 5: Arrange for Payment and forward to TAX EXPRESS (See cover page or e-filing info sheet for specific details)

You will be notified by Tax Express in writing once your return has been accepted. If Direct Deposit selected, your IRS refund is normally deposited to your account on Fridays; a check takes about a week longer. **If filing a state return, your state refund will arrive separately. State Revenue offices have independent timetables and methods for dispersing their state refunds.** In the event your return contains mathematical errors, is missing information or additional documents are needed to complete the electronic filing process, Tax Express will contact you by phone or mail. Corrections may cause your refund to be delayed and result in a customer service fee. Tax Express cannot be held responsible for IRS delays. The IRS is responsible for funding the direct deposit. **Reasons for possible delays:** 1) If you have an outstanding debt to a federal/state agency, owe prior year taxes, child support or student loans ; 2) missing or incorrect social security numbers and year of birth; 3) SSN#, year of birth or name does not match with the Social Security Administration; 4) missing EIN or SSN for child care provider on Form 2441; 5) Incorrect Direct Deposit Information.

LIMITED WARRANTY: Tax Express Refund Service (TERS) hereby warrants that it will use its best efforts to process customer's return through the electronic filing program to the IRS in an expeditious manner. In the event TERS fails to perform in a manner substantially consistent with the above guarantee, customer's sole and exclusive remedy is limited to a refund of the processing fee. IN NO EVENT WILL TERS OR ITS OFFICERS, EMPLOYEES OR OTHER REPRESENTATIVES, BE LIABLE FOR ANY LOSSES OF ANY AMOUNT OF MONEY OVER AND ABOVE WHAT TERS HAS BEEN PAID AND PARTICULARLY IN NO EVENT WILL THERE BE LIABILITY FOR CONSEQUENTIAL, EXEMPLARY OR PUNITIVE DAMAGES, EXCEPT AS NOTED ABOVE. TERS SHALL NOT BE LIABLE OR RESPONSIBLE FOR ANY DELAYS IN PROCESSING CUSTOMER'S INCOME TAX RETURN, IN THE DELIVERY OF CUSTOMER'S REFUND, OR IN THE PERFORMANCE OF ITS OBLIGATION HEREUNDER DUE TO CAUSES BEYOND ITS CONTROL, INCLUDING, BUT NOT LIMITED TO, ACTS OF GOD, STRIKES, LABOR PROBLEMS, CHANGES IN IRS OR OTHER GOVERNMENTAL POLICIES OR LAWS, DATA TRANSMISSION PROBLEMS, EQUIPMENT MALFUNCTIONS, PROCEDURAL DELAY AND DELAYS CAUSED BY THE IRS.

**IRS E-FILE SIGNATURE  
AUTHORIZATION FORM**

**Tax Year  
201\_\_**

**INSTRUCTIONS LOCATED ON BACK OF THIS FORM**  
*Questions? Contact us at (800) 866-2003*

<b>First Name</b>	<b>Last Name</b>	<b>Your social security number</b>
<b>Spouse's First Name</b>	<b>Last Name</b>	<b>Spouse's social security number</b>
<b>Street Address</b>	<b>Apt#</b>	<b>IMPORTANT!! Daytime phone number</b>
<b>City</b>	<b>State</b>	<b>Zip</b>
		<b>(    )    --</b>

**If you're getting a TAX REFUND, ENTER EXPECTED REFUND AMOUNT HERE :**   
**HOW WOULD YOU LIKE TO RECEIVE YOUR REFUND?**

- I consent that my refund be directly deposited into the account designated on my Federal Income Tax Return. If I have filed a joint return, this is an irrevocable appointment of the other spouse as agent to receive refund. **BE SURE TO ENTER YOUR DIRECT DEPOSIT INFORMATION IN THE "REFUND" SECTION OF YOUR 1040 TAX RETURN ( this section is located above the signature line on your tax return).**
- I do not want direct deposit of my refund. Please mail my refund check to the address indicated on my tax return. I understand a mailed tax refund takes approximately 1 week longer to receive than direct deposit.

**If you OWE TAXES, indicate the amount you owe here:**   
**HOW WOULD YOU LIKE TO PAY THIS TAX?**

- I will mail my tax payment to the IRS no later than April 15.
- I authorize the US Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated for payment of my Federal taxes owed on this return and/or a payment of estimated tax. I further understand that this authorization may apply to subsequent Federal tax payments that I direct to be debited through the Electronic Federal Tax Payment System (EFTPS). This authorization is to remain in full force and effect until I notify the US Treasury Financial Agent to terminate the authorization. To revoke a payment, I must contact the US Financial Agent no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I understand that if US Treasury does not receive full and timely payment of my tax liability, I will remain liable for the tax liability and all applicable interest and penalties.

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts above are the amounts shown on the copy of my electronic income tax return. I consent to allow Tax Express Refund Service to send my return to the state and receive from the State (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) an indication of any refund offset, (c) the reason for any delay in processing the return or refund, and (d) the date of any refund, if applicable. I have authorized Tax Express Refund Service to select a random number as my personal identification number (PIN) as my signature for my electronic income tax return, and, if applicable, my Electronic Funds Withdrawal consent.

**SIGN HERE**

**SIGN HERE**

**TAXPAYER'S SIGNATURE** \_\_\_\_\_ **DATE** \_\_\_\_\_ **SPOUSE'S SIGNATURE** \_\_\_\_\_ **DATE** \_\_\_\_\_

**PART III - ERO PIN # 126791-12345 --- I certify that this is my PIN, which is my signature for the electronically filed income tax return for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Pub 1345.**

**STATE E-FILE SIGNATURE  
AUTHORIZATION FORM**

**Tax Year  
20\_\_**

*(use this form if you're also filing your state return)*

First Name	Last Name	Your social security number
Spouse's First Name	Last Name	Spouse's social security number
Street Address	Apt#	<b>IMPORTANT!!</b> Daytime phone number
City	State	Zip

**If you're getting a TAX REFUND, ENTER EXPECTED REFUND AMOUNT HERE :**

**HOW WOULD YOU LIKE TO RECEIVE YOUR REFUND?**

- I consent that my refund be directly deposited into the account designated on my State Income Tax Return. If I have filed a joint return, this is an irrevocable appointment of the other spouse as agent to receive refund. **BE SURE TO ENTER YOUR DIRECT DEPOSIT INFORMATION IN THE "REFUND" SECTION OF YOUR TAX RETURN (this section is located above the signature line on your tax return). ENTER INFORMATION CAREFULLY TO AVOID DELAYS.** \*\*SEE FOOTNOTE
- I do not want direct deposit of my refund. Please mail my refund check to the address indicated on my tax return. I understand a mailed tax refund takes approximately 1 week longer to receive than direct deposit.

**If you OWE TAXES, indicate the amount you owe here:**

**HOW WOULD YOU LIKE TO PAY THIS TAX?**

- I will mail my tax payment to the state taxation authority no later than April 15.
- I authorize the State Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated for payment of my state taxes owed on this return and/or a payment of estimated tax. I further understand that this authorization may apply to subsequent state tax payments that I direct to be debited through the Electronic Tax Payment System (EFTPS). This authorization is to remain in full force and effect until I notify the State Treasury Financial Agent to terminate the authorization. To revoke a payment, I must contact the State Financial Agent no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I understand that if state does not receive full and timely payment of my tax liability, I will remain liable for the tax liability and all applicable interest and penalties.

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts above are the amounts shown on the copy of my electronic income tax return. I consent to allow Tax Express Refund Service to send my return to the state and receive from the State (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) an indication of any refund offset, (c) the reason for any delay in processing the return or refund, and (d) the date of any refund, if applicable. I have authorized Tax Express Refund Service to select a random number as my personal identification number (PIN) as my signature for my electronic income tax return, and, if applicable, my Electronic Funds Withdrawal consent.

***State Revenue Offices do not deposit in the same timeframe as the IRS, and can take longer than 10-14 days. Tax Express Refund makes no guarantees as to how long a state refund may take to deposit.***