

## Tax Return Filing Options

Name: \_\_\_\_\_

Email: \_\_\_\_\_

### PLEASE SELECT PREFERENCE REGARDING THE TAX ORGANIZER BOOKLET:

- In the future, please e-mail my tax organizer.
- In the future, I would like to obtain my tax organizer by logging into the client portal on your website and downloading the file through a secure file transfer protocol. (most secure)
- In the future, please mail my tax organizer
- In the future, tax organizer booklet not needed

### PLEASE SELECT ONE OF THE FOLLOWING FILING OPTIONS:

- File my return electronically with the IRS and Franchise Tax Board. (Recommended)  
(Fastest Refund)
- OR.**
- I elect to **not** file my individual tax return electronically with the IRS and Franchise Tax Board.

### PLEASE SELECT FROM THE FOLLOWING TAX RETURN OPTIONS:

- I would like **my copy** of the tax return sent to me electronically in an Adobe file format (.PDF).
- I would like **my copy** of the tax return sent to me electronically in a password protected Adobe file format (.PDF).
- I would like to obtain my copy of the tax return by logging into the client portal on your website and downloading the file through a secure file transfer protocol. (Most secure. Recommended.)
- I would like **my copy** of the tax return printed and assembled.
- Please mail my return.
- I will pickup my return.
- I authorize \_\_\_\_\_ to pick up my return.

### IF I HAVE A REFUND:

- Please contact me.
- I would like my refund applied to next year's taxes.
- I would like my refund mailed to me.
- Please direct deposit my refund using last year's direct deposit information.
- Please direct deposit my refund into the following account:

Bank name \_\_\_\_\_ Savings  Checking

Account # \_\_\_\_\_ ABA Routing # \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_