800-TAX REFUND, Inc.
a better way...

Save time. Save money.

...using 800-TAX REFUND's Tax e-form℠

Just fill it out, fax it back, and let our professional staff prepare your Federal and State tax forms. In 48-72 hours you'll receive your completed tax forms via email, at which time you can email, call, or video chat with your preparer to discuss your return and approve it for efile!

All for just $199!

Tax e-form℠ is also fillable by using Acrobat Reader 8+, so you can upload it with your tax documents to us. It's simple and secure. Just visit this site to safely upload your documents, or send your documents to us by secure email .

Tax e-form℠

Fill it out. Fax it in. Review results. Approve for e-file.

NOTE: IRS did not publish a Refund Cycle Chart for the current tax season, instead advising taxpayers to check the "Where's My Refund?" link at www.irs.gov for an individualized refund deposit date.

"Where's My Refund?" includes a tracker that displays your tax return's progress through three stages:

1. Return Received
2. Refund Approved
3. Refund Sent

Return progress can be updated by IRS on a daily basis instead of weekly as in prior years, and the Refund Sent date will be actual instead of estimated.

Overall acceptance-to-deposit timeframe is expected to be similar to past years in which direct deposit refunds (that were not pulled for review) were received 7 to 14 days after acceptance, faster for simpler returns.

Fed & State
PROFESSIONALLY PREPARED
Just $199!

Frequently Asked Questions:

- ***Which tax forms can be prepared with Tax e-form℠?***

All of the most popular forms and schedules: Schedule A (Itemized Deductions), Schedule B (Interest & Dividends), Schedule EIC (Earned Income Credit), Form 2441 (Child Care Credit), Form 6251 (Alternative Minimum Tax), Form 8812 (Additional Child Tax Credit), and Form 8880 (Retirement Savings Credit). In addition, we'll calculate your tax on Capital Gains Distributions and Qualified Dividends, figure your taxable Pension and Social Security Benefits, your Student Loan Interest Deduction, your tax on Early Retirement Distributions, and even perform a Married Joint vs. Separate comparison! If your tax situation requires forms other than above, including some Affordable Care Act obligations, we may require or you can request additional worksheets (extra charges apply) to assist us in preparing more complex returns.

- ***Which States can be prepared with Tax e-form℠?***

All States that have an income tax. We can also prepare Non-Resident/Part-Year Resident State returns if required (extra charge applies to prepare more than one State).

- ***What's the purpose of the Electronic Filing Instructions?***

Convenience. Tax e-form℠ users can authorize the filing of their taxes any time after receiving their tax forms, either by phone, by email, or by video chat. The Electronic Filing Instructions are *optional* – leave the section blank, or choose not to activate your instructions when you call in if you do not wish to file electronically or if you would rather authorize the electronic filing of your taxes using the IRS Form 8879 signature authorization.

- ***When is the fee debited from my bank account?***

Should you choose this option, expect your account to be debited the $199 fee two or three days after we process your Tax e-form℠.

Tax e-form℠

Professional Tax Preparation & Electronic Filing

NOTE: W2s (Wages), 1099-Rs (Pensions & Annuities), and 1099-DIVs (Dividends & Distributions) must be faxed, preferably Federal Copy B.
Also fax Health Insurance Marketplace Form 1095-A if you received one, and statements for Social Security Benefits and Unemployment Benefits if you received this income in 2023

Bank & Payment Info.

Choose how to pay for our service:

▶ Credit Card # ____ - ____ - ____ - ____ MC VISA DISC Exp. ___/___ Amount $199.00 cardholder's signature ______________________

▶ Direct Debit. I authorize 800-TAX REFUND, Inc. to initiate a one-time debit of $199.00 from the depository account indicated below. I understand that 800-TAX REFUND, Inc. reserves the right to re-present said debit, plus $15.00, should the debit be returned for non-sufficient funds. account owner's signature ______________________

Your bank info. Please complete if you:

▶ a) authorize $199 payment to 800-TAX REFUND, Inc. by Direct Debit above; or,
b) request Direct Deposit of your Federal/State tax refund(s) on Page 2; or,
c) request payment of your Federal/State taxes by Direct Debit on Page 2

Routing Number (9 digits beginning with 01 thru 12 or 21 thru 32)

Account Number (include dashes)

Type: ☐ Checking ☐ Savings

Personal Info.

Taxpayer First Name & Init | Last Name | Social Security Number | Date of Birth (mm-dd-yyyy)

○ Check here if you can be claimed as a dependent on another person's tax return. ○ Check if Blind ○ Check if you want $3 to go to the Presidential Election Campaign

Street Address | Apt. No. | City | State | Zip Code

Day Phone: ( )

Eve Phone: ( )

If you (or Spouse) earned income as a resident of any State other than above, please list the State: ____ *and when you lived there in 2023:* from / to

E-Mail Address (optional)

○ Check here if you would like your tax return(s) e-mailed to you upon completion. *(PDF format; requires Adobe Acrobat Reader 7.0 or higher)*

Which best describes your marital status? (check one)

○ Taxpayer was never married in 2023, or was legally *(by Court decree)* separated or divorced as of December 31, 2023. Do not enter Spouse information.

Taxpayer's spouse died ○ in 2021 ○ in 2022, or ○ in 2023 and Taxpayer has not remarried since. Enter Spouse information *only if* Spouse died in 2023.

Taxpayer was legally married as of December 31, 2023 and lived with Spouse at least one day during the last 6 months of 2023. Enter Spouse information and:
○ include Spouse income for us to determine if it is better to file Joint or Separate, *or,* ○ do not include Spouse income if you *must* file separate from Spouse.

Taxpayer was legally married as of December 31, 2023 and ○ did not live with Spouse at any time during the last 6 months of 2023. Spouse information is optional - enter Spouse information and income to file with Spouse, or leave blank to file without Spouse.

Spouse First Name & Init | Last Name (if different from Taxpayer's) | Spouse Social Security Number | Date of Birth (mm-dd-yyyy)

○ Check here if Spouse can be claimed as a dependent on another person's tax return. ○ Check if Blind ○ Check if you want $3 to go to the Presidential Election Campaign

Information about your children and others you cared for:

Dependent First Name	Last Name (if diff. from Taxpayer's)	Relationship	Social Security Number	# months lived with you in 2023	Date of Birth (mm-dd-yyyy)	Check if in 2023 was:
		☐ Son/Daughter ☐ Grandchild ☐ Other Relative ☐ Non-Relative	- -		- -	○ full-time Student ○ Disabled
		☐ Son/Daughter ☐ Grandchild ☐ Other Relative ☐ Non-Relative	- -		- -	○ full-time Student ○ Disabled
		☐ Son/Daughter ☐ Grandchild ☐ Other Relative ☐ Non-Relative	- -		- -	○ full-time Student ○ Disabled
		☐ Son/Daughter ☐ Grandchild ☐ Other Relative ☐ Non-Relative	- -		- -	○ full-time Student ○ Disabled

Check if above ○ is being claimed as a dependent on another person's return ○ had gross income of $4450 or more in 2023 ○ can be claimed as your dependent due to Divorce Decree or Form 8332 (printed after each dependent row)

Check here if you're listing dependents and : ○ *someone other than you (or spouse) paid more than half the cost of keeping up your home.*
○ *a member of your household (other than spouse) had higher gross income than you in 2023.*

Other Income

Interest Income from 1099-INT: Payor's Name	Interest Income Box 1	Early Wdrwl Pnlty Box 2	Int on US Svgs & Treas Obl Box 3	Non-Taxable Interest	Fed. Tax Withheld
	$	$	$	$	$
	$	$	$	$	$

Other Income: Gambling Income $ ____ If you itemized last year and received State or Local Tax Refunds, enter the total here . . . $ ____ Other Misc. Income --- Enter description below: $ ____

Fax Tax e-form® to (800)794-8851. Receive your results and confer with your tax preparer.

Tax e-form℠

Taxpayer SSN from Page 1 ___ - ___ - ___

Deductions and Child Care

Itemized Deductions:

Out-of-pocket Medical and Dental expenses (not incl. expenses reimbursed by others) . . $

State and Local **Income** taxes paid (**do not** include State/Local withholding from W-2s) $

Enter any Sales tax paid on a new motor vehicle/boat/plane you purchased in 2023 $

Real Estate taxes paid . . . . $

Personal Property taxes paid . . . . $

Home Mortgage Interest and Points reported on Form 1098 . . . . $

Home Mortgage Interest not reported to you on Form 1098 . . . . . $

NEW: Home Equity Interest reported above not used to buy, build, or improve your (1st or 2nd) residence . . . $

Mortgage Insur Premiums Paid in 2023 . . $

Points not reported to you on Form 1098 . $

Total Monetary Gifts (by cash or check) . . $

Total Non-Monetary Gifts ($500 or less in value) . . . . . $

Gambling Losses . . . . $

NOTE: Job Expenses and other Miscellaneous Itemized Deductions (subject to 2% floor) have been eliminated from the new tax law

Student Loan Interest Deduction: Student Loan Interest paid in 2023 for Taxpayer, spouse, and/or dependent(s) . . . $

Child Care: Name the children who were cared for in 2023, and the amount paid for each child:

$ ___ $ ___ $ ___

If filing joint, was ◯ Taxpayer ◯ Spouse a full-time Student or Disabled in 2023?

Care Provider's Name | Care Provider's EIN or SSN

Street Address

City, State and Zip Code | Amount Paid

Care Provider's Name (attach additional sheet if more than two) | Care Provider's EIN or SSN

Street Address

City, State and Zip Code | Amount Paid

Need more tax forms prepared? Go to www.800taxrefund.com to get our easy-to-use worksheets, starting at just $35 apiece, and check which ones you'll attach:

- ☐ Self-Employment Income/Expenses (Sch C)
- ☐ Rental Income/Expenses (Sch E)
- ☐ Capital Gain Sale of Assets (Sch D)
- ☐ Moving Expenses (Form 3903)
- ☐ Non-Cash Contributions > $500 (Form 8283)
- ☐ Education Expenses (Form 8863)

Email, call, or video chat!

Electronic Filing Instructions (activate after receiving forms)

NOTE: If you choose to leave this section blank, we must provide you with a completed e-file Authorization Form to sign and fax back to us before we can file your taxes electronically.

▶ *If we determine that you're getting a TAX REFUND (Federal or State), would you like to have the refund Directly Deposited?*

☐ No, I do not want direct deposit of my refund(s). Please have my refund check(s) mailed to my home address indicated on Page 1 of my Tax e-form®. I understand that refund checks by mail take **five** days longer to receive than direct deposit.

☐ Yes, I consent that my refund(s) be directly deposited into the account indicated on Page 1 of my Tax e-form®. If I have filed a joint return, this is an irrevocable appointment of the other spouse as an agent to receive the refund(s).

▶ *If we determine that you OWE TAX (Federal or State), would you like to pay the amount you owe by Direct Debit on April 15, 2024?*

☐ No, if I owe tax, I will mail my tax payment(s) using the voucher(s) included with my tax forms, or I will arrange to pay my balance due using an IRS and/or State-approved Installment or Credit Card plan. I understand I must file my tax return(s) electronically after I have reviewed my forms.

☐ Yes. **Electronic Funds Withdrawal Consent. See below.**

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, 2023, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my Federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. I further understand that this authorization may apply to future Federal tax payments that I direct to be debited through the Electronic Federal Tax Payment System (EFTPS). I authorize EFTPS to issue me a personal identification number (PIN) to access EFTPS. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To request that my PIN be mailed to me, or to revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received 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 further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN:

I authorize 800-TAX REFUND, Inc. to enter my PIN as my signature on my Tax Year 2023 electronically filed income tax return.

enter five numbers - do not enter all zeros

Your Signature ▶ ________ Date ▶ ________

Spouse's PIN:

I authorize 800-TAX REFUND, Inc. to enter my PIN as my signature on my Tax Year 2023 electronically filed income tax return.

enter five numbers - do not enter all zeros

Spouse's Signature ▶ ________ Date ▶ ________

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