



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

Save time. Save money.

...using 800-TAX REFUND's Tax e-formSM

Just fill it out, fax it back, and let our professional staff prepare your Federal and State tax forms. In 24-48 hours you can call our toll-free number to hear your results, have your tax forms faxed or e-mailed to you, and even authorize us to file your tax forms electronically.

All for just \$149!

Tax e-formSM 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-formSM

Fill it out. Fax it in. Call for results.

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.



Frequently Asked Questions:

• ***Which tax forms can be prepared with Tax e-formSM?***

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-formSM?***

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

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

Convenience. Tax e-formSM users can call any time of the day to authorize the electronic filing of their taxes using their touch-tone phone. 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 by the traditional method of using a signature form.

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

Should you choose this option, expect your account to be debited the \$149 fee two or three days after we process your Tax e-formSM.

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 2018.

Bank & Payment Info.

Choose how to pay for our service: Credit Card #, MC VISA Exp. /, Amount \$149.00, cardholder's signature, Direct Debit authorization, Routing Number, Account Number, 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, Street Address, Apt. No., City, State, Zip Code, Day Phone, Eve Phone.

Which best describes your marital status? (check one), Taxpayer was never married in 2018, Taxpayer's spouse died, Taxpayer was legally married as of December 31, 2018 and lived with Spouse, Taxpayer was legally married as of December 31, 2018 and did not live with 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.

Information about your children and others you cared for: Dependent First Name, Last Name, Relationship, Social Security Number, # months lived with you in 2018, Date of Birth, Check if in 2018 was: full-time Student, Disabled.

Other Income

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, Other Misc. Income.

SSN input fields

Deductions and Child Care

Itemized Deductions:

Form for itemized deductions including medical, state taxes, mortgage interest, etc.

Form for child care and student loan interest deductions.

Form for Affordable Care Act required information.

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

Electronic Filing Instructions (activate when calling for results)

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.

- Questions about direct deposit of refund and payment of tax.

- Question about Electronic Funds Withdrawal Consent.

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, 2018, and to the best of my knowledge and belief, it is true, correct, and complete.

Taxpayer's PIN: I authorize 800-TAX REFUND, Inc. to enter my PIN as my signature on my Tax Year 2018 electronically filed income tax return.

Your Signature

Spouse's PIN: I authorize 800-TAX REFUND, Inc. to enter my PIN as my signature on my Tax Year 2018 electronically filed income tax return.

Spouse's Signature

Taxpayer PIN input box

Date

Spouse PIN input box

Date

