

# Tax e-form®

Save time. Save money.

Use 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 about 24 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 \$79!



**Fill it out.**



**Fax it in.**



**Call for results.**

## **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), Schedule M (Making Work Pay/Government Retiree 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, 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 charges may apply to prepare more than one State).

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

Convenience. Tax e-form® 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 \$79 fee two or three days after we receive your Tax e-form®.



**Fed & State  
with e-file  
just \$79!**

#### For tax returns accepted by IRS on:

January 15 thru 20  
January 21 thru 27  
Jan 28 thru Feb 3  
February 4 thru 10  
February 11 thru 17  
February 18 thru 24  
Feb 25 thru Mar 3  
March 4 thru 10  
March 11 thru 17  
March 18 thru 24  
March 25 thru 31  
April 1 thru 7  
April 8 thru 14  
April 15 thru 21

#### Expect your Federal & State deposits on:

January 29  
February 5  
February 12  
February 19  
February 26  
March 5  
March 12  
March 19  
March 26  
April 2  
April 9  
April 16  
April 23  
April 30

800-TAX REFUND, Inc.

942 North Main Street  
Akron, Ohio 44310  
Voice: (800) 829-7338  
Fax: (800) 794-8851  
www.800taxrefund.com

NOTE: W2s (Wages), 1099-Rs (Pensions & Annuities), and 1099-DIVs (Dividends & Distributions) must be faxed, preferably Federal Copy B. You must also fax your statements for Social Security Benefits and Unemployment Benefits if you received this income in 2009.

Bank & Payment Info.

Choose how to pay for our service: Credit Card #, MC VISA Exp. /, Amount \$79.00, cardholder's signature, Direct Debit authorization, Routing Number, Account Number, Type: Checking/Savings, a) authorize \$79 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

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, E-Mail Address (optional), Check here if you would like your tax return(s) e-mailed to you upon completion.

Which best describes your marital status? (check one)

Marital status options: Taxpayer was never married in 2009, or was legally separated or divorced as of December 31, 2009. Do not enter Spouse information. Taxpayer's spouse died in 2007, 2008, or 2009 and Taxpayer has not remarried since. Taxpayer was legally married as of December 31, 2009 and lived with Spouse at least one day during the last 6 months of 2009. Taxpayer was legally married as of December 31, 2009 and did not live with Spouse at any time during the last 6 months of 2009.

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:

Table with columns: Dependent First Name, Last Name (if diff. from Taxpayer's), Relationship, Social Security Number, # months lived with you in 2009, Date of Birth (mm-dd-yyyy), Check if in 2009 was: full-time Student, Disabled. Includes checkboxes for being claimed as a dependent and gross income thresholds.

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, Other Misc. Income, If you itemized last year and received State or Local Tax Refunds, enter the total here.

\_\_\_\_-\_\_\_\_-\_\_\_\_

### 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 **motor vehicle/boat/plane** you purchased or leased in 2009 . . . \$ \_\_\_\_\_, \_\_\_\_\_

Real Estate taxes paid . . . . . \$ \_\_\_\_\_, \_\_\_\_\_

Personal Property taxes paid . . . . . \$ \_\_\_\_\_, \_\_\_\_\_

Home Mortgage Interest and Points reported to you on Form 1098 . . . . . \$ \_\_\_\_\_, \_\_\_\_\_

Home Mortgage Interest *not* reported to you on Form 1098 . . . . . \$ \_\_\_\_\_, \_\_\_\_\_

Points not reported to you on Form 1098 . . . . . \$ \_\_\_\_\_, \_\_\_\_\_

Total Monetary Gifts (by cash or check) . . . . . \$ \_\_\_\_\_, \_\_\_\_\_

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

Unreimbursed Employee Expenses: (check descriptions below) . . . . . \$ \_\_\_\_\_, \_\_\_\_\_

Travel Expenses     Equip. & Tools     Education  
 Union Dues         Uniforms/Clothing     Prof. Dues & Pubs.

Other Expenses: (check descriptions below) . . . . . \$ \_\_\_\_\_, \_\_\_\_\_

Tax Preparation     Safe Dep. Box     IRA Account Fees

Gambling Losses . . . . . \$ \_\_\_\_\_, \_\_\_\_\_

Student Loan Interest Deduction: Student Loan Interest paid in 2009 for taxpayer, spouse, and/or dependent(s) . . . \$ \_\_\_\_\_, \_\_\_\_\_

Child Care: Name the children who were cared for in 2009, and the amount paid for each child:

_____	_____	_____
\$ _____, _____	\$ _____, _____	\$ _____, _____

If filing joint, was  Taxpayer  Spouse a full-time Student or Disabled in 2009?

Care Provider's Name \_\_\_\_\_ Care Provider's EIN or SSN \_\_\_\_\_

Street Address \_\_\_\_\_

City, State and Zip Code \_\_\_\_\_ Amount Paid \$ \_\_\_\_\_, \_\_\_\_\_

Care Provider's Name \_\_\_\_\_ 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](http://www.800taxrefund.com) to get our easy-to-use worksheets, starting at just \$15 apiece, and check which ones you'll attach:**

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

### 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.

- ▶ **If we determine that you're getting a TAX REFUND (Federal or State), would you like to have the money 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 ten 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, 2010?**
  - No, if I owe tax, I will mail my tax payment(s) in by April 15, 2010, or arrange to pay my taxes owed using my credit card by calling 1-888-2PAY TAX. I understand I still have the option to 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, 2009, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the Refund or Amount Owed listed above is the amount from my electronic income tax return. I consent to allow 800-TAX REFUND, Inc. to send my return to IRS and to receive from the IRS a) an acknowledgment 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 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). In order for me to initiate future payments, I request that the IRS send 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 revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 businessdays 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 2009 electronically filed income tax return.

\_\_\_\_\_  
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 2009 electronically filed income tax return.

\_\_\_\_\_  
do not enter all zeros

Spouse's Signature ▶ \_\_\_\_\_

Date ▶ \_\_\_\_\_

