**Tax Preparation Payment Authorization – Sign & Return with Organizer**

Thank you for the opportunity to prepare your tax returns. Please complete the organizer attached, complete and sign this authorization, and return it with your tax documents.

**[FIRM NAME] FINISH & FILE PROCESS:**

We are updating our process to simplify your tax return review, signature, e-filing and payment of our fees. Here is what will happen when we complete your returns:

1. We will send you an email link to review your tax returns and electronically sign Form 8879 to authorize us to e-file your returns.
2. We will electronically charge your payment authorization for our fees.
3. We will e-file your return with the Federal and applicable State Agencies. Unless you hear from us, you are finished!
4. Please note, we will shred all paper documents you share with us. We do retain electronic copies. If you want to keep originals, please only provide us with electronic versions or paper copies.

Please circle one payment option and sign the Payment Authorization Agreement below. **We estimate the fee to prepare and file your tax returns will be [CURRENT FEE].** If the final bill is different from this amount, we will discuss the change before charging your payment.

**PAYMENT AUTHORIZATION AGREEMENT:**

1. Please use the same bank information used for my tax return refund. OR

2. Bank Routing \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bank Account Number \_\_\_\_\_\_\_\_\_ OR

3. Credit Card # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Exp \_\_\_\_\_\_\_ CVV \_\_\_\_\_\_ OR

4. Please pay the fee from my Federal Tax Refund, including a bank fee of $45.

I authorize [FIRM NAME] to charge the payment information above for my tax return preparation fees, when my returns are ready to e-file.

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Signature Date