

Form 1040**Bank Account Verification**

Name: _____

You have indicated that you would like to receive a refund via direct deposit to your bank account. Per IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number, and type of account below. If there are any changes, please make them on this form. Sign and date at the bottom to indicate upon your review and verification that the account listed is correct and return it to our office.

Primary Account

Name of Financial Institution..... _____

Routing Transit Number..... _____

Account Number..... _____

Type of Account..... _____

Joint Account?..... _____

As of September 30, 2025, the IRS is no longer accepting paper checks. If you would like your balance due and/or estimated payments to be set up electronically and come out as of the due date, please check the boxes below. Otherwise the payments will need to be set up and paid online by you personally.

☐

Please use the above account for any balance due on my federal/state/local returns

☐

Please use the above account for any estimated tax payments that are due.

Taxpayer Signature_____
Date_____
Spouse Signature_____
Date**DO NOT SUBMIT THIS DOCUMENT TO IRS**