



**Preferred Tax PAYMENT Option, if applicable (check one)**

- Paper Check
- Direct Debit (Please provide bank information)

**Preferred Estimated Tax PAYMENT Option, if applicable (check one)**

- Paper Check
- Direct Debit (Please provide bank information)

**Preferred Tax REFUND Option, if applicable**

- Direct Deposit (Please provide bank information)

Bank Name \_\_\_\_\_  Checking  Savings

Routing # \_\_\_\_\_

Account # \_\_\_\_\_

**Are you waiting on any additional tax forms? If so, please describe:**

**Is there anything else you would like us to know about before completing your tax returns? Please tell us:**

**PLEASE SIGN BELOW**

To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Signature  \_\_\_\_\_

Date \_\_\_\_ / \_\_\_\_ / 2026

*Thank you for choosing Sam Phillips, CPA!*