

THE IRS IS **REQUIRING** THAT WE



YOUR RETURN THIS YEAR (2023 Forms 1040 and 1041)

If you DO NOT wish to e-file, you may opt out, but you MUST complete the BOTTOM of this form and return it to us. If you do wish to e-file, please complete the TOP of this form to instruct us on how to prepare your return (check one (1) of the boxes below). Thank you!

I wish to e-file my return the following way (choose ONLY ONE):

- DIRECT DEPOSIT if I am receiving a refund OR A PAYMENT VOUCHER (to be mailed by you) if I am paying additional tax. **Please attach a copy of a void check for the account where you wish to receive your refund.**
- DIRECT DEPOSIT OR DIRECT BANK DEBIT regardless of whether I am receiving a refund or paying additional tax. **Please attach a copy of a void check for the account that you wish to use.**
- Regardless of whether I am receiving a refund or paying additional tax, I wish to receive A REFUND CHECK OR A PAYMENT VOUCHER (to be mailed by you).

*****Please provide us with a current, valid e-mail address that is regularly checked** (we will e-mail IRS e-file Signature Authorization Form 8879 to you when your return is ready):

e-mail address: _____

Other Important e-file information:

According to IRS regulations, ALL taxpayers must review their information and acknowledge that the information is “true, correct and complete” BEFORE we are allowed to transmit the return electronically to the IRS. We will provide the necessary form and instructions for you to comply with this requirement AFTER the return is complete.

Please fill out either top section OR bottom section (not both).

I do NOT wish to have my return e-filed (please sign below)

My tax preparer, Hanna, Lemar & Morris, CPA's PA has informed me that they may be required to electronically file my 2023 income tax return (Form 1040 or Form 1041) if they file it on my behalf. I do NOT want to file my return electronically and choose to file my return on paper forms. My preparer will not file my paper return with the IRS. I will file (mail) my paper return with the IRS myself. I was NOT influenced by Hanna, Lemar & Morris, CPA's, PA or any member of the firm.

Signature(s) _____
(Taxpayer) (Spouse, if joint return)

Print/Date _____
(print name) (date) (print name) (date)