

Return Refund to IRS/State Form (Current Year Checks Only)

Primary Taxpayer: Customer ID/Last 4
 Secondary Taxpayer: Digits of Taxpayer's SSN:
(customer ID can be obtained at www.sbtpg.com)
 Current Mailing Address:

1. Check which refund(s) is/are being requested to be returned:
 Federal Refund (IRS) State Refund (Except State of GA)
2. Have funds been received by Taxpayer(s)? Yes No
3. If yes, provide the original Check information Below:

Check Number: Check Amount: Check Date:

Note: If refund was sent by Direct Deposit to a bank account or onto a prepaid debit card, the taxpayer must recover the funds from the institution where the refund was sent and return the money directly to the IRS.

Reason for refund (check only one)

No Signed Bank Application Possible Fraud Customer Service Issue
 Provide brief explanation:

Deceased Taxpayer (Provide copy of death certificate)

4. For **Tax Preparers**, witness each Taxpayer's signature, sign form, provide EFIN and Copy of Check with **"VOID"** written across the face of the check. E-mail form and Check Copy to: support@sbtpg.com
5. For **Taxpayers**, if Tax Preparer doesn't witness your signature(s), sign the form & provide their EFIN, you must:
 ~Mail original check ~Mail copy of unexpired government-issued picture ID ~Mail copy of Social Security Card

To: TPG – Professional Division
 11085 N. Torrey Pines Rd. Suite 210
 La Jolla, CA 92037

I understand it may take up to 15 Business Days to process my request once all documents are received. I agree that TPG and its bank service provider will not be liable for any cost due to delays in processing this request.

By signing below, I do hereby attest that I am legally authorized to request and receive the funds due and payable to the individual(s) noted above; and request that the said funds be returned to the IRS and/or State Tax Authority. By returning the funds to the IRS, I understand that it may delay my refund up to 14 weeks or more. I also understand and agree that my request is subject to verification by the Santa Barbara Tax Products Group, LLC (TPG) of all information provided above. I also understand that if my request is approved, I may be obligated to pay tax preparation services directly to the tax preparation company I used.

Primary Taxpayer Signature (Print) First and Last Name Date

Secondary Taxpayer Signature (Print) First and Last Name Date

EFIN Owner Signature (Print) First and Last Name EFIN# Date