

How to pay by refund with Advance

sunloan
and tax services

LYNN, 9790

Enter form code

Form Code Guide

Taxpayer Information

Consent

Dependents

Income

Due Diligence

Deductions & Credits

Health Care

States

Balance

Review Forms

Finish

File

Balance

Here you can decide how to handle the refund or balance due on this return. You can choose a bank product by check or receiving the refund by check you may skip this section.

Return Balances

Federal
Refund: **\$2,943.00**

Taxpayer Identification

Taxpayer Identification

Bank Product Information

+ Add form

Direct Deposit Information

+ Add form

Electronic Funds Withdrawal Information

Click + Add form

Bank Product Information

1. Always check this box [Consent to Disclosure of Tax Return Information](#)

The taxpayer has signed and been provided a copy of the Consent to Use of Tax Return Information AND the Consent to Disclosure of Tax Return Information as required by IRS regulation 7216.

2. Click Refund Advance with RT [Consent to Disclosure of Tax Return Information](#) [Consent to Disclosure of Tax Return Information](#)

Product Selection

- Refund Advance with RT
- Refund Advance without RT (No fees collected)
- RT

[Clear](#)

Refund Advance only

If the taxpayer is approved for an interest-based loan, does he or she want that loan or only the no-cost loan?

The taxpayer requests the disclosure of prior year's anticipated refund and funding amount (if available) be disclosed to the

3. From the dropdown choose F (up to \$7000 with interest) or L (up to \$1000 no interest)



F - Full amount available (interest-based)

L - No-Cost Refund Advance

Refund Advance only

If the taxpayer is approved for an interest-based loan, does he or she want that loan or only the no-cost loan?

The taxpayer requests the disclosure of prior year's anticipated refund and funding amount (if available) be disclosed to the financial institution.

Add state refunds to the refund deposit product

A All states ▾

4. Click Yes

Full amount available (interest-based) ▾

Yes No [Clear](#)

5. Click A - All states

Pre-Ack Advance

6. Before the IRS officially opens (apprx. January 20th) you MUST check Apply for a Pre-Ack Advance

Apply for a Pre-Ack Advance

Disbursement Method

Prepaid Card

Check printed in tax office

Direct Deposit

ID Information

ID information should be entered on the IDS screen

Additional Information

Override tax preparation fees to be WITHHELD

\$

Additional Preparation Fee to be WITHHELD

\$

Deduction for other fees paid to ERO

\$

Physical address, if different from taxpayer information screen

Address

ZIP

 -

City

State

 ▾

Security Information

Security question

1 - What is your mother's maiden name? ▾

Answer

SMITH

Preferred language

1 - English ▾

Taxpayer is active military

Yes No

Clear Spc

Cancel

Save

7. Choose how the taxpayer wants to receive their refund

8. Ask the taxpayer what security question they want and enter the answer

9. Choose taxpayer language

10. Answer active military question