

Bank Products for Tax Preparers

Bank products can be a great benefit for your clients and you. They integrate seamlessly with TaxSlayer Pro tax software and enable your clients to pay your preparation fees directly from their refund. Bank products allow you to offer more options, appeal to a broader customer base, and grow your business.

TaxSlayer® PRO



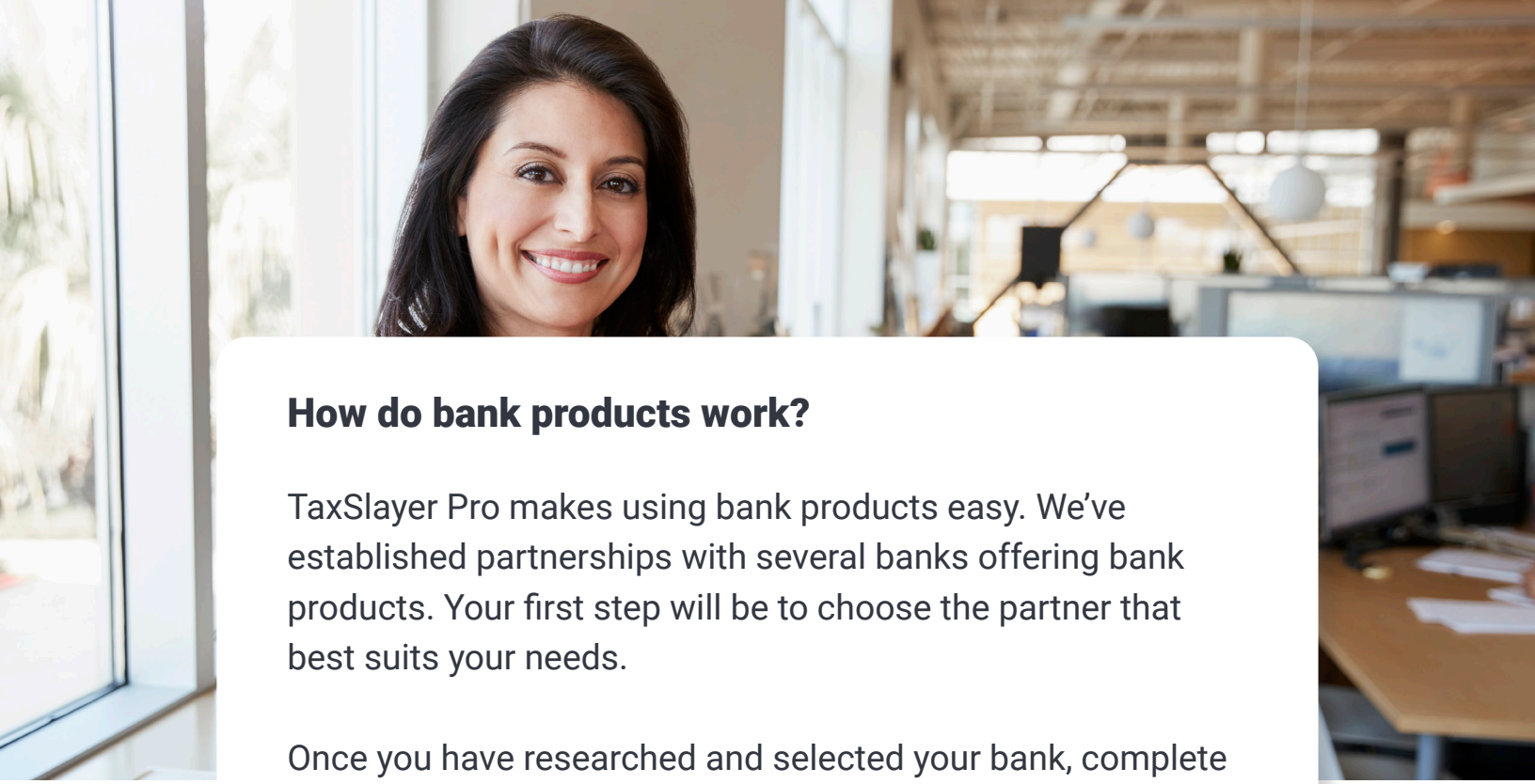
What are bank products?

TaxSlayer Pro partners with several banks, so you can find a financial partner that fits your business. With bank products, you won't need to hassle with sending invoices or waiting to be compensated. Not only will you be paid faster, but many clients prefer the flexibility of this payment option.

Your clients will appreciate no upfront costs for your services and options for receiving their refund, whether via a check, prepaid card, or direct deposit.

These benefits can result in increased business, help you stay ahead of the competition, and keep current customers loyal. You can choose one of the following bank partners when you partner with TaxSlayer Pro:

- Santa Barbara Tax Products Group
- EPS
- Refund Advantage
- Refundo



How do bank products work?

TaxSlayer Pro makes using bank products easy. We've established partnerships with several banks offering bank products. Your first step will be to choose the partner that best suits your needs.

Once you have researched and selected your bank, complete an application in Account Hub, and wait for approval. Once approved, follow these easy steps to file returns:

1. Discuss disbursement options with your client (direct deposit, check or debit card)
2. Provide written disclosures and obtain consents if required by law, including under IRS Code Section 7216
3. Print all required documents through TaxSlayer Pro
4. E-file as a refund transfer (RT) if your customer chooses to pay your fees out of their refund

Once the IRS funds the refund, the bank partner will automatically withhold your preparation fee and the RT fee. You will receive your payments via direct deposit to your account, and the taxpayer will receive the remainder of their refund via their preferred method.

Each bank may offer different products with their own terms and conditions. Please note that not all EROs will qualify for all programs. It is up to you to determine which bank is right for you, and which products to offer your clients.



Benefits to you

- Receive payment faster
- Gain a competitive edge in the market through a better mix of service offerings
- Compete with large tax franchises
- Attract new customers who can’t or don’t want to pay upfront
- Offer client different options for receiving their refund
- Earn additional revenue from refund transfer partner incentives based on volume
- Create opportunities to offer additional services such as audit assistance and ID protection

Benefits to your client

- No out-of-pocket cost for tax preparation services
- Refund delivery options (check, card, deposit)

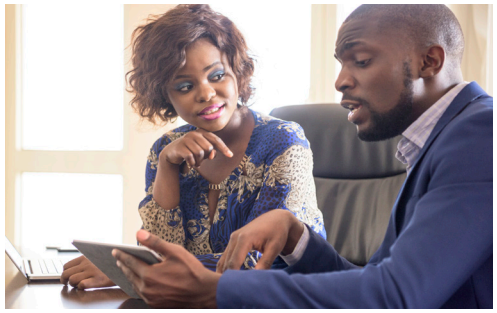


We offer cloud-based and desktop tax preparation software for preparers across the United States with all the forms and features needed to prepare and electronically file tax returns for clients.

About TaxSlayer Pro

TaxSlayer Pro, trusted by more than 20,000 professional tax preparers nationwide, makes tax filing simpler and less stressful for millions of Americans with exceptional, easy-to-use technology. An authorized IRS e-file provider, the company has been building tax software since 1989. With TaxSlayer Pro, customers enjoy the experience of using software and a mobile app built by tax preparers, for tax preparers.







TaxSlayer® PRO