PREPARE + PROSPER

DIRECT DEPOSIT INFORMATION

Preferred name(s): _____
(Taxpayer) (Spouse)

Print the routing number and account number for your savings and/or checking account. Your tax preparer will use this information on your return.

- ☐ I don't expect to get a refund and will not need to share my direct deposit information.
- ☐ I have a voided check or other account document to verify direct deposit information.
  (Skip writing your account information and continue with split refund section below.)

SAVINGS ACCOUNT

Routing number: __ __ __ __ __ __ __ __ __

Account number: __ __ __ __ __ __ __ __ __ __ __ __

CHECKING ACCOUNTS AND CFR FOCUS CARDS

Routing number: __ __ __ __ __ __ __ __ __

Account number: __ __ __ __ __ __ __ __ __ __ __ __

SPLIT YOUR REFUND!

Save part of your tax refund! You can put part of your federal refund in a checking account and part in a savings account. How do you want to receive your refund?

I want my federal refund to be:

- ☐ split between my savings and checking
- ☐ split between my account(s) and a U.S. Savings Bond (see reverse side for bond details)
- ☐ all in my savings account
- ☐ all in my checking account
- ☐ as a paper check delivered by mail

I want my Minnesota refunds:

- ☐ all in my savings account
- ☐ all in my checking account
- ☐ as a paper check delivered by mail

ARE YOU SPLITTING?

If you're splitting your refund into multiple accounts, please share details below.

Savings: _____

Checking: _____

Notes:

PREPARE + PROSPER

U.S. SAVINGS BONDS

You can use part of your federal tax refund to purchase up to three U.S. savings bonds – one for you and up to two for other people. It's a safe investment that will earn approximately 2% interest for up to 30 years. You must keep the bond for at least one year. The amount is flexible! Purchase bonds in $50 increments between $50 and $5,000. Adding a co-owner or beneficiary is optional.

I want a bond for me: Amount: _____

I want a bond for someone else: Amount: _____

Name: _____

Co-owner or beneficiary for bond: _____

I want another bond for someone else: Amount: _____

Name: _____

Co-owner or beneficiary for bond: _____

GET A NEW ACCOUNT

Don't have a direct deposit account or want a new one? You can get your money faster and more securely with a new CFR Focus Card or a new FAIR account.

Are you interested in getting a new account?

- ☐ Yes - I want to sign up for a new CFR Focus Card today.
- ☐ Yes - Give my contact information to the FAIR team to schedule an enrollment appointment with me.
- ☐ Help! I already have a CFR Focus card, but I need to look up the routing and account number.
- ☐ No, thank you.

CFR FOCUS CARD

These prepaid debit cards are available regardless of credit and banking history. The CFR Focus card has no monthly fee and no minimum balance required. We can sign you up for a card today to deposit your refund!

By signing below, I give Prepare + Prosper consent to share my contact information and other required personal information with Community Financial Resources to open a CFR Focus card. Your consent is valid for one year from today.

Signature: _____

Date: _____

FAIR ACCOUNTS

FAIR checking and savings accounts have no overdraft fees, no minimum balance requirement, and are available regardless of your banking history. We can schedule an appointment to open an account before your tax return is finalized so you can use it to direct deposit your refund.

By signing below, I give Prepare + Prosper consent to share my contact information for the purposes of scheduling a FAIR enrollment appointment. Your consent is valid for one year from today.

Signature: _____

Date: _____