

Welcome to Rapid Tax

We understand with this epidemic, that most of us want to limit the amount of personal contact with anybody. That is why we has come up with this system.

1. Download the Instructions & Interview set.
2. Print and Fill out the Interview Sheet completely and sign it.
3. Send us a selfie (picture of you holding your personal identification).
4. Send us either a picture or a PDF of all your Tax documents. Your W2's, Advanced Child Tax Credit Received Form 6419, The 1095A if you have Market Place insurance. Your Unemployment, if you received any.
5. If you are a new customer, we need the Social Security Cards for everybody and the Birth Certificates for the children on the tax return.
6. If you are not a new customer, all we need is the social Security Cards and birth certificate for new children you want to add.
7. Call the office where you send these documents by e-mail to let them know you are asking for a consultation. They will talk with you and start preparing your tax return within 24 hours.
8. Once prepared, and agreed upon, we can send you your tax return, encrypted, through email. OR you can come in to finish the paperwork for less hassle.
9. We cannot file your tax retun without your consent. That is why you must send us back the signed 2848, Power Of Attorney to file your tax return.
10. You decide how you want to recive your tax refund, or pay the amount due. We suggest a direct deposit in to your bank account if you have a refund. We can also print a check for you in our office.
11. You can pay our fees either by credit card over the phone, or, if you have a refund coming, we can take our fees out of your refund. It is your choice.

The office locations are:

10714 Perrin Beitel Phone 210-880-1200 Email: rt1@rapidtax.org
5108 Fredicksburg Rd. Phone 210-377-3700 Email: rt5@rapidtax.org
1331 Fair Ave. Phone 210-534-7400 Email: rt2@rapidtax.org

Thank you for considering Rapid Tax

Rapid Tax

Taxpayer Interview Sheet - Tax Year 2023

Filing Status: Single ___ Married Filing Joint ___ Head Of Household ___

Taxpayer S.S.N. First Name, M.I. Last Name DOB
 ___ - ___ - ___ / /

Spouse ___ - ___ - ___ / /

Work #(___) - ___ Home #(___) - ___ Cell#(___) - ___

Email Address _____ @ _____

Address... _____

City..... _____ State _____ Zip _____

Dependent's Name	S.S.N.	Relationship	Months In Home	Date of Birth	1099T Tuition	1095A Insurance

If the IRS does not release your refund for any reason, then you will be responsible to Rapid Tax for the Total Expected Fees for our services rendered. They are listed on the Bill, which is included with your printed tax return. You are hereby notified that you are to make payment in full to Rapid Tax within 60 days of the Electronic Filing date. Failure to pay the Total Expected Fees for preparation and/or Electronic Filing will result in **Theft Of Services** charges pursued against you.

I hereby consent to **receive text message and/or Email** When your Refund Has/or Will be released, Reminders and Coupons from or on behalf of Rapid Tax, at the telephone number and/or email address provided herein. I understand that consent is not a condition of purchase or receiving a service and that I may STOP consent to receive text message or email advertisements at any time. You should receive no more than 10 text or emails per year. I understand and agree that any text message I receive may be sent by an auto dialer. Our Privacy Policy is listed on our webpage near the bottom at www.rapidtax.org.

By signing this document, I agree to pay a \$40 data entry fee if I do not complete the tax return, and pay for the completed return.

X _____ / /
 Taxpayer or Spouse Signature Date

EF Check/DD (Pay Now)	
RT Check	
RT DD	
RT Advance	

CONSENT TO USE OF TAX RETURN INFORMATION

Rapid Tax (“we”, “us” and “our”)

Printed Name of the Tax Preparation Company

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

If you do not consent, then you may still have your tax return prepared and electronically filed by us for a fee.

For your convenience, we have entered into arrangements with third party affiliates to provide qualifying taxpayers with the opportunity to apply for financial products (Loan, Electronic Refund Check, or Electronic Refund Deposit). We have also entered into an arrangement with Versicom Communications to offer qualifying taxpayers ABCvoice Tax Infoline. To determine whether these products may be available to you, we will need to use your tax return information by analyzing it and calculating the amount of your anticipated refund.

If you would like us to use your tax return information to determine whether these products may be available to you while we are preparing your return, please sign and date this consent to the use of your tax return information.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to use the information you provide to us during the preparation of your 2023 tax return to determine whether to present you with the opportunity to apply for these products and services.

Printed Name of Taxpayer

Taxpayer Signature

Date

Printed Name of Joint Taxpayer

Joint Taxpayer Signature

Date

If you believe your Tax Return Information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

Rapid Tax

_____ By signing this document, I am Authorizing For Release Of Information from the Bureau of the Fiscal Service, its employees, agents, and contractors, to disclose to Rapid-Tax and their employees any and all information related to a debt owed by me to the United States Government, to a State, or any debt enforced by a State, including child support obligations, and/or any payments made or due to me by a Federal or State agency, and/or any tax return information disclosed to Fiscal Service by the Internal Revenue Service in order to collect tax debt through the levy process under 26 U.S.C. § 6331(h), and to conduct tax refund offset under 26 U.S.C. §§ 6402. Tax return information is defined in 26 U.S.C. § 6103(b). Information includes, but is not limited to, correspondence and other information related to my debt(s) or payment(s), including my tax refund payment(s).

_____ By signing this document, I am Authorizing Rapid Tax and their employees to use IRS Website "Where Is My Refund" on my behalf, to help me understand if the IRS is delaying or will delay my refund for any reason, and help resolve any issues identified.

_____ By signing this document, I am Authorizing For Release Of Information from the Texas Workforce Commission, its employees, agents, and contractors, to disclose to Rapid-Tax and their employees any and all information related to the amount of unemployment I have received in this Tax Year.

_____ Under penalty of perjury, I declare that the information I have given is true and correct to the best of my knowledge. I understand that giving any false or fraudulent information can cause the IRS to suspend my Earned Income Credit for up to 10 years and/or imprisonment for up to 5 years.

_____ **I have not filed and will not file my 2023 Tax Return Online or with any other tax company.**

_____ **(Circle One) I Do / Do Not** Want my Tax return Direct Deposited. If you do, please give us your:

Bank Name: _____

Routing Number: _____

Account Number: _____

_____ I understand that the Instant Advance Loan from \$500-\$6000 is a loan Application and it can be denied by Republic Bank. Rapid Tax does NOT have the authority to approve or deny, or change the application after the return has been electronically filed, even if the loan has been denied.

X _____ /_____/_____
Taxpayer Signature Date

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FMS Taxpayer: Clear / _____ Agency Phone _____

FMS Spouse: Clear / _____ Agency Phone _____

Taxpayer Unemployment \$ _____ Spouse Unemployment \$ _____