eFile Authorization

eFile Authorization – Individuals

This eFile authorization form is for individual or personal tax returns. To provide us with eFile authorization for your partnership or corporate tax returns, please use the button below-

Business Tax Return e-File

We have created a completely paperless system for authorizing the electronic filing of your Federal and State tax returns. By completing the following eFile Authorization form, you are consenting to the electronic signing of Form 8879 and similar state forms. If you want to review, sign and return the paper forms, please refer to your tax return PDF in your client portal for instructions.

Otherwise, please read the following disclosure, and complete the following items. Thank you!

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year selected below, and to the best of my knowledge and belief, it is true, correct, and complete. I consent to allow the Watson CPA Group as an Electronic Return Originator to send my return to the IRS and any State taxing jurisdictions, and to receive (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund.

If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my Federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. I further understand that this authorization may apply to future Federal tax payments that I direct to be debited through the Electronic Federal Tax Payment System (EFTPS). In order for me to initiate future payments, I request that the IRS send me a personal identification number (PIN) to access EFTPS. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.

If applicable, I authorize State taxing jurisdictions and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my State taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.

I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Warning! If you recently sent us changes or additional information, DO NOT give us authorization to eFile until you've received the updated tax returns.

Validate

Identity Confirmation - Form 8879

Your tax return PDF is assembled in this order-

1. Transmittal Letter (Cover Letter)
2. Invoice
3. Filing Instructions
4. Form 8879
5. Summaries and Comparisons
6. Tax Returns

If you are using Adobe, bookmarks should be available as well. You will need some information from Form 8879 to answer the following questions. This PDF was securely emailed to you with the password as your SSN without dashes. And this PDF was also uploaded to your Client Portal.

1. Your adjusted gross income (AGI) is located on Line 1 of Form 8879.

Adjusted Gross Income

2. Your 5-digit PIN is also located on Form 8879, about half way down.

Taxpayer PIN

Spouse PIN

If you need help locating your AGI or PIN, please let us know. Again, this is on the first page of your tax return PDF.

Identity Confirmation - Personal Info

To ensure that the person(s) submitting this electronic filing authorization is the person(s) named on the tax returns please complete the following information. Please be confident that your identity and security is our top priority.

Address, City, State, Zip

Taxpayer Date of Birth

Last 4 of TaxPayer SSN

Taxpayer Phone Number

Taxpayer Email Address

Spouse Date of Birth

Last 4 of Spouse SSN

Spouse Phone Number

Spouse Email Address

Signature - Taxpayer

By typing my name below, I attest that I have reviewed my tax returns. Further, I am consenting to the electronic submission of my eFile Authorization for my Federal, and all State tax returns as applicable, and I further authorize the Watson CPA Group as an Electronic Return Originator to electronically file all tax returns on my behalf.

Taxpayer Full Legal Name

Signature - Spouse

By typing my name below, I attest that I have reviewed my tax returns. Further, I am consenting to the electronic submission of my eFile Authorization for my Federal, and all State tax returns as applicable, and I further authorize the Watson CPA Group as an Electronic Return Originator to electronically file all tax returns on my behalf.

Spouse Full Legal Name

Survey (Please Help)

There are two types of relationships we can have with our clients. And we want to make sure we are serving your needs correctly. One is the transactional relationship where we complete a service for you, and the relationship is paused until the next transaction. The ball is in your court, but we are always available to you whenever, for whatever.

The other relationship is more ongoing or bundled, where we complete a service for you but you also want periodic interactions with us. We reach out to you to help plan, review or project various things such as taxes, retirement, education savings and other what-if scenarios. Wow- that is a long sentence, but you get the idea. Conversely, the ball is in our court and we ping you 2-3 times per year, and schedule consultations as necessary.

Please help us identify the relationship (transactional or ongoing) you would like with the Watson CPA Group below-

Would you want to review your financial planning and retirement objectives with our financial advisor? If so, please describe your goals below-

Would you want to review your estate planning such as wills and trusts with our trusted estate attorney? If so, please describe your goals below-

We are continuously improving for you. If we did not earn a 10 in customer service, please describe your recent experience with the Watson CPA Group below-

Submission

Please select the tax year that this electronic filing authorization is associated with.

Tax Year ⦿2018 ○2017 ○2016 ○2015