

Banking Information Required for Tax Refund Processing

To ensure timely processing of your tax return and any applicable refund, please **include** your **banking information** when returning your tax organizer to our office, in accordance with the mandate noted below.

If banking information is missing and you are due a refund, this may delay both tax preparation and the receipt of your refund. To avoid delays, we recommend submitting this information with the tax organizer provided.

Banking information may be securely uploaded through our secure portal or emailed directly to me at derick.wong@dwcpatax.com.

Please let me know if you have any questions. Thank you for your cooperation during the busy tax season.

- **Mandate:** Effective September 30, 2025, the IRS (<https://www.irs.gov/newsroom/irs-to-phase-out-paper-tax-refund-checks-starting-with-individual-taxpayers>) is phasing out paper checks for individual tax refunds.
- **Action Required:** Taxpayers **MUST** provide valid bank account and routing numbers on their 2025 tax returns
- **Missing Information:** If banking info is not provided, the IRS (<https://www.irs.gov/newsroom/questions-and-answers-about-executive-order-14247-modernizing-payments-to-and-from-americas-bank-account>) will send a letter requesting it, which may **'delay'** the refund by over six weeks.

Sincerely,

Derick H. Wong CPA, MBA, MST, PhD