

DELETE THE PAPERWORK. HIT SEND.

IRS **e-file**

**SO EASY,
NO WONDER
40 MILLION
PEOPLE
USE IT.**

**Accurate!
Secure!
Paperless!**



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IRS **e-file**

The Future of Tax Filing is Here!

So easy, no wonder 40 million people use it. You can file electronically, sign electronically, and get your refund or even pay electronically. The IRS *e-file* program offers accurate, safe and fast alternatives to filing on paper. These include 1 filing through an “Authorized IRS *e-file* Provider”, 2 filing through a personal computer, or if eligible, 3 filing over the telephone using TeleFile. IRS *e-file* is used by millions of satisfied taxpayers each year as a more convenient way to file income taxes.

WHAT IS IRS *e-file*?

It is the most accurate, safest and fastest way to file and pay federal income taxes electronically.

IRS *e-file* is the brand name for totally paperless processing of your tax return information. You or your preparer use tax preparation software to enter your return information, then send it to IRS over telephone lines. You or your preparer then receive e-mail confirmation of return receipt within 48 hours. IRS computers quickly and automatically check for errors or missing information. IRS *e-file* gets you your refund in half the usual time—even faster and safer with Direct Deposit. If you owe a balance due, you can file and use an electronic funds withdrawal from your bank account or pay by credit card. The chance of an audit of an *e-filed* return and a paper return do not differ. Even a return with a foreign address can be *e-filed*. For free or low cost filing options for taxpayers who qualify, check out the IRS Web site at www.irs.gov.

WHAT ARE THE BENEFITS OF IRS *e-file*?

- **Accuracy!** Your chance of getting an error notice from the IRS is significantly reduced.
- **Security!** Your privacy and security are assured.
- **Electronic Signatures!** Create your own Personal Identification Number (PIN) and file a completely paperless return through your tax preparation software or tax professional. There is nothing to mail.
- **Proof of Acceptance!** You receive an electronic acknowledgement within 48 hours that the IRS has accepted your return for processing.
- **Fast Refunds!** You get your refund in half the time, even faster and safer with Direct Deposit—in as few as 10 days.
- **FREE/Low-Cost Filing!** Check out the IRS Web site at www.irs.gov for IRS *e-file* partners offering free or low-cost filing options to taxpayers who qualify.
- **Electronic Payment Options!** Convenient, safe, and secure electronic payment options are available. *e-file* and pay in a single step. Schedule an electronic funds withdrawal from your bank account (up to and including April 15, 2002) or pay by credit card. There’s no check to write, no money order to purchase, and no voucher to mail.
- **Federal/State *e-file*!** Prepare and file both Federal and state returns together and double the benefits you get from *e-file*.

HOW DO I GET
A FAST REFUND?

DIRECT DEPOSIT
Simple. Safe. Secure.

Use Direct Deposit. To choose a Direct Deposit refund, indicate on the refund portion of the electronic return the financial institution’s routing transit number, the account number and the type of account—checking or savings. The refund is

deposited automatically into the account. Taxpayers who file electronically and choose Direct Deposit receive their refunds in less than half the time paper filers do—in as few as 10 days.

HOW DO I FILE A PAPERLESS RETURN?

Paperless filing—it's easier than you think.

It's available to most taxpayers who file electronically using tax preparation software or filing through a tax professional. The process includes creating a five-digit Personal Identification Number (PIN) which serves as your electronic signature and when prompted, entering your Adjusted Gross Income (AGI) from your originally filed income tax return for Tax Year 2000 [not from an amended return (Form 1040X)]. If you don't have your Tax Year 2000 tax return, call the IRS at 1-800-829-1040 to get a free transcript of your account. Also, your Date of Birth (DOB) will be used to verify your identity. Make sure your DOB is accurate and matches the information in the Social Security Administration (SSA) files prior to *e-filing*. To do this, check your annual "Social Security Statement." Paperless filing is also available for first-time filers who were 16 or older on December 31, 2001. With IRS *e-file*, there's nothing to sign and nothing to mail—not even your Forms W-2.

HOW DO I PAY ELECTRONICALLY?

Two electronic payment options are available to taxpayers: electronic funds withdrawal (direct debit) and credit card. These options provide you with ways to make paperless income tax payments. You authorize an electronic funds withdrawal from a checking or savings account when you *e-file* your tax return. This option allows you

to file early and schedule an electronic payment for withdrawal on a future date up to the day the tax return is due. If your bank is a credit union, make sure an electronic funds withdrawal can be made from your share account. A credit card payment can be made when *e-filing*, or by phone or Internet. If you pay by phone or Internet, you receive a confirmation number at the end of the transaction. Your bank or credit card statement will include the U.S. Treasury Tax Payment transaction. Make your payment from wherever you are, 24 hours a day, 7 days a week.

HOW CAN I FILE MY FEDERAL AND STATE TAXES TOGETHER?

File Federal and state income tax returns together using *e-file* and double the benefits of *e-file*! The tax preparation software automatically transfers relevant data from the Federal return to the state return as the information is entered. Currently 37 states and the District of Columbia participate in the Federal/State *e-file* program. To see a complete list of states, check the IRS Web site at www.irs.gov.

TAX PROFESSIONAL



IRS *e-file* Using an Authorized IRS *e-file* Provider

Many tax professionals can now electronically file paperless returns for their clients. As a taxpayer, you have two options:

- You can prepare your return, take it to a tax professional, and ask to sign it electronically using a five-digit self-selected Personal Identification Number (PIN), and then have the professional transmit it electronically to the IRS; or

2 PERSONAL COMPUTER



IRS *e-file* Through Your Personal Computer

You can file your income tax return in a fast, safe, convenient way using your personal computer. And now it's paperless! A computer with a modem or Internet access is all you need to file your tax return using IRS *e-file*. You can buy tax preparation software at various electronics stores, computer stores and office supply stores; you can download software from the Internet; or prepare and file your return completely on-line by using a tax preparation software package (nothing to buy or install). Best of all, you can *e-file* from the comfort of your home any time of day or night. Sign your return electronically using a five-digit self-selected PIN to complete the process. There is no signature form to submit or Forms W-2 to send in. When signing electronically, IRS *e-file* is totally paperless! Within 48 hours of filing, you will receive confirmation that the IRS has received your return for processing. To find free and low-cost *e-file* opportunities for taxpayers who qualify or a list of all software companies that participate in the IRS *e-file* program, visit our Web site at www.irs.gov.

- You can have a professional prepare your return, you sign it electronically using a five-digit self-selected Personal Identification Number (PIN), and have your preparer transmit it for you electronically.

Tax professionals may charge a fee to provide IRS *e-file*. Fees may vary depending on the professional and the specific services rendered.

3 TELEPHONE



IRS *e-file* using TeleFile

For millions of eligible taxpayers, TeleFile is the easiest way to file. TeleFile allows you to file your simple Federal income tax return using a touch-tone telephone. Only taxpayers who met the qualifications for Form 1040EZ in the prior year are eligible to receive the TeleFile Tax Package for the current year. A TeleFile tax package is automatically mailed to you if you are eligible. In six states, you can file your state and Federal tax returns together using TeleFile. A state TeleFile tax package is mailed to those who qualify. TeleFile is completely paperless—there are no forms to mail in. Just follow the instructions in the package and complete the TeleFile Tax Record, pick up a telephone and call the toll-free number any time day or night. TeleFile is filed directly with the IRS, takes about 10 minutes and is absolutely FREE.

THE IRS IS ON THE WORLD WIDE WEB

Visit the IRS Web site at www.irs.gov to get the latest information on IRS *e-file*. Add the IRS Web site to your "Favorites" and go to it often to get up-to-date information. Find out about our IRS *e-file* Partners that offer FREE or low-cost filing options: which software companies offer IRS *e-file*; or search for an "Authorized IRS *e-file* Provider" near you.