



Financial Planning & Investment Management

TAX YEAR 2024

Bank Account Information

This information is used to process the direct deposit of refunds or the direct debit (electronic funds transfer - EFT) of balance due payments. This information must be verified each year for accuracy and security.

Please complete the information and provide with your tax information. Include a VOID check for any new account or for a change of account from the prior year. You will also be asked to review and verify this information prior to electronic filing as a double-check.

Taxpayer Name: _____

Type of account: Checking Savings

Joint account? : (Both spouses on the account if Married Filing Jointly)

Name of Bank/Institution: _____

Routing (ABA) Number: _____ (9 digit bank # - in lower left of check)

Account Number: _____ (your account #)

26 Essex Street

Andover, MA 01810

P 978.475.3242 • F 888.974.0397

www.the-financial-advisors.com

40R Merrimac Street, Suite 101W

Newburyport, MA 01950

P 978.463.6660 • F 888.974.0397