Refund Settlement Solutions

TaxWise partners with several banks, allowing you to offer prepaid debit cards, print checks in your office or request direct deposits for your clients. This service provides taxpayers options in receiving their refunds, as well as a convenient way to pay tax preparation fees.

You can also offer cash advances on your clients' refunds. Each bank places different limitations and requirements on this offer; the amount a taxpayer can receive in advance ranges from $500 to $1,250.

Visit the websites for each partner to learn more about the services, associated fees and limitations. The banking partners you can choose from are:

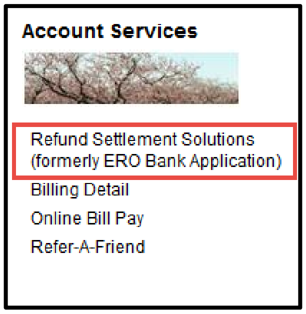
- Santa Barbara Tax Products Group
- Refund Advantage
- Republic Bank
- River City
- 3Fund

Applying to Offer Refund Settlement Solutions

If you plan to offer refund settlement solutions to your clients, you must first apply with a banking partner. You will need your EFIN and company information to complete the application.

To do this:

1. Access the TaxWise Solution Center at https://support.taxwise.com/. Under the Account Services section, click Refund Settlement Solutions.



2. Log in with your Client ID, User Name and Password.

3. Click the **Enroll/Notify Bank** link for the bank with which you wish to apply.

4. Follow the on-screen prompts and instructions to complete and submit your ERO application.
5. TaxWise submits your application to the bank, and you will be notified after the bank processes your application.

Partner Verification

After the bank accepts your application, you must download your fees in TaxWise.

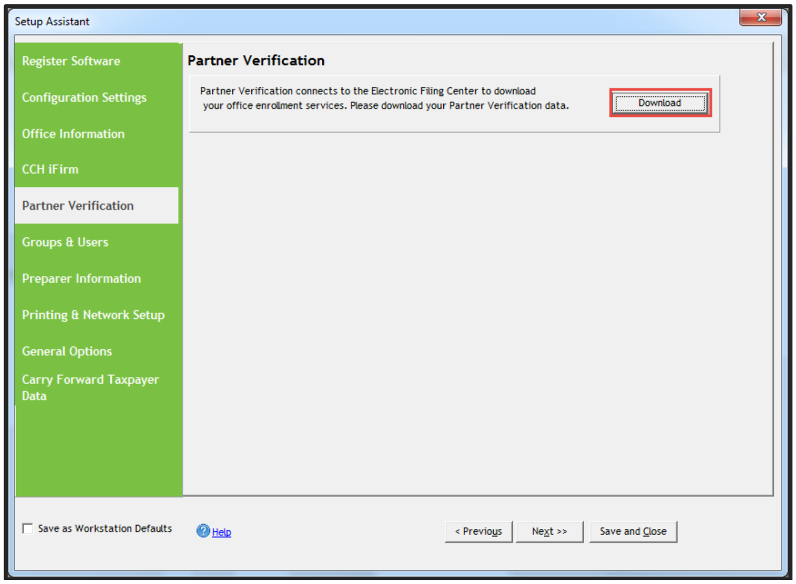
To do this:

1. Log in to TaxWise as the admin user.

2. On the Tools menu, click Utilities/Setup Assistant.

3. On the Utility window, click the **Setup** menu and select **Setup Assistant**.

4. Click **Partner Verification**, and click **Download** to connect to the TaxWise EFC.



5. This downloads your refund settlement solution enrollment into TaxWise.