

# Required Information For Electronic Filing- Complete All 5 Sections Below

## Section 1: W-2s and 1099-Rs

If you received a form W-2 or 1099-R select the "Add" button below to add the applicable form. You will need to enter each item separately.

**Complete one electronic W-2 for every W-2 you received.**

Click the Add button for each W-2 you received . . .

**Complete one electronic 1099-R for every 1099-R you received.**

Click the Add button for each 1099-R you received ...

## Section 2: Boxes C and D Must Match

To prevent issues with your e-filed return, perform the following reconciliation:

A	Total the federal withholding amounts entered on the W-2's, 1099- R's and W-2Gs in Section 1 above and enter it in Box A.	A	
B	Enter in Box B the total amount of other withholding that you are reporting on Form 1040A, line 36 that is not reported on a form in Section 1 above. These amounts come from documents such as SSA- 1099, 1099- DIV, 1099- MISC, 1099- B, other 1099s or Schedule K-1's.	B	
C	Total Federal Withholding (Box A plus Box B) .	C	
D	Total Federal Withholding from Form 1040A, Line 36.	D	

**Box C and Box D MUST match to activate the 'Efile Now' button.**

(If not, check the amounts you have entered in Box A and Box B.)

## Section 3: Verifying Your Identity

As the taxpayer, enter **one** of the following two pieces of information. If you are filing a joint return with your spouse, your spouse must complete **one** of the three pieces of information also.

- (a) Look at last year's (2012) federal tax return and enter the Adjusted Gross Income (AGI) in the space provided. Look at the AGI on **line 37** of the Form 1040, **line 21** of the Form 1040A and **line 4** of the Form 1040EZ. If you are filing Married Filing Jointly with the same spouse that you filed in 2012, the prior year AGI will be the same for both you the "Taxpayer" and your "Spouse". If you did not file a return last year, enter a zero in the AGI space provided.

Taxpayer

Spouse

Last year's AGI: ..... \_\_\_\_\_

OR

- (b) If you don't have or can't remember last year's AGI, <http://www.irs.gov/Individuals/Electronic-Filing-PIN-Request>, or call the IRS at 1-866-704-7388 to get an Electronic Filing PIN from the IRS and enter it in the space provided (all 5 digits are required).

Taxpayer

Spouse

Electronic Filing PIN: ..... \_\_\_\_\_

## Section 4: Signing This Year's Return

You (and your spouse if filing Married Filing Joint) will need to sign this return electronically. To do so enter a 5-digit PIN, your date of birth, and today's date.

Taxpayer

Spouse

Select any 5-digit PIN to sign this return.

(Your PIN(s) cannot be 12345 or 00000) ..... \_\_\_\_\_

Date of Birth (mm/dd/yyyy) ..... \_\_\_\_\_

Today's Date (mm/dd/yyyy) ..... \_\_\_\_\_

E-mail address (for confirmation e-mail) .....  
Re-enter e-mail address (must match) .....

**Disclosure Statement**      I agree

Under penalties of perjury, I declare that I have examined this return (or request for refund) including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete. I consent to allow my Intermediate Service Provider, transmitter, or Electronic Originator (EROS) to send my return (or request for refund) to the IRS and to receive the following information from the IRS: a) an acknowledgement of receipt or reason for rejection of transmission; b) an indication of any refund offset; c) the reason for any delay in processing the return or refund; and d) the date of any refund. I am signing this Tax Return by entering my Self-Select PIN above.

**Section 5: Payment Options**

Review the option below that applies to you and complete any required entry fields.

**A. Paying Tax Due by Check** If you are paying with a check print Form 1040V and mail it with your check to the IRS (print your return to get Form 1040V). You have no further action in this step.

**B. Electronic Withdrawal of Tax Due (Does not apply to estimated tax payments)** If you would like to pay your balance due using direct debit enter the required information below and agree to the disclosure statement.

Routing number .....		Account number .....	
Type: .....	Checking	Savings	Not applicable (if not using direct debit)
Date to make withdrawal . .....			
<b>Note:</b> do <b>not</b> enter direct deposit information here, enter it on the return			
Day time phone number . . .....			

**Electronic withdrawal disclosure statement**      I agree

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 for payment of my federal taxes owed on this return and the financial institution to debit the entry to this account. I further understand that this authorization may apply to subsequent federal tax payments that I direct to be debited through the Electronic Federal Payment System (EFTPS). In order for me to initiate subsequent 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.