

Payment Authorization Agreement Template   
**FOR TAX PROFESSIONALS**

We know you are busy — that’s why we have created this time-saving payment authorization agreement template for you to use with your clients.

This document includes **one** template.

**To use the template:**

1. Choose the template you want to use and update all of the content highlighted in [red brackets]. You can also customize any part of the document to fit your practice’s needs. Once you have updated your content, be sure to change the text color of your updated content to match the rest of the body text in the letter.
2. When you have the content updated for your business, delete this title page, save, and distribute to your clients.

We hope you find this template useful. Please let us know if there are other templates you would like added to these professional marketing resources.

Sincerely,  
Your QuickBooks and ProConnect Team

**Tax Preparation Payment Authorization – Sign & Return with Organizer**

Thank you for the opportunity to prepare your tax returns. Please complete the organizer attached, complete and sign this authorization and return with your tax documents.

**[FIRM NAME] FINISH & FILE PROCESS:**

We are updating our process to simplify your tax return review, signature, e-filing and payment of our fees. Here is what will happen when we complete your returns:

1. We will send you an email link to review your tax returns and electronically sign the 8879 to authorize us to e-file your returns.
2. We will electronically charge your payment authorization for our fees.
3. We will e-file your return with the Federal and applicable State Agencies. Unless you hear from us- you are finished!
4. Please note we will shred all paper documents you share with us. We do retain electronic copies. If you want to keep originals, please only provide us with electronic versions or paper copies.

Please circle one payment option and sign the Payment Authorization Agreement below.  **We estimate the fee to prepare and file your tax returns will be [CURRENT FEE].** If the final bill is different from this amount, we will discuss the change before charging your payment.

**PAYMENT AUTHORIZATION AGREEMENT:**

1. Please use the same bank information used for my tax return refund. OR

2. Bank Routing \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bank Account Number \_\_\_\_\_\_\_\_\_ OR

3. Credit Card # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Exp \_\_\_\_\_\_\_ CVV \_\_\_\_\_\_ OR

4. Please pay the fee from my Federal Tax Refund, including a bank fee of $[59.90].

I authorize [FIRM NAME] to charge the payment information above for my tax return preparation fees, when my returns are ready to e-file.

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Signature Date