



# Bank Product Information and Fees Agreement

Dear Client,

You have chosen our pay-by-refund option, **Refund Transfer**, to pay your tax preparation fees.

Refund Transfer is a deposit product offered by Santa Barbara Tax Products Group, LLC, a subsidiary of Green Dot Corporation, Green Dot Bank, Member FDIC, that enables authorized amounts to be deducted from taxpayer's refund, with the remaining balance then paid to the taxpayer. Fees apply. Refund Transfers are not loans. **Tax refund and e-filing are required to receive Refund Transfer.** Terms and conditions are subject to change without notice.

To use your tax information to process the Refund Transfer, please review and sign the Consent to Use and Consent to Disclosure forms also.

**To use this payment option:**

- Your federal or state (if applicable) refund must be enough to cover your tax preparation fees plus applicable bank product and processing fees of (\$150).
- You must have a US address.
- You have to e-file.
- The name on the bank account needs to match the name on the tax return.
- You'll need to direct deposit your refund into a single account.

**Special Note:** *We offer Refund Transfer for clients with total tax preparation fee of \$300 or more. The \$100 Non-Refundable Retainer is still required to be paid before any work can commence. The remaining tax preparation fee plus applicable bank product fees are what is deducted from a client's refund. Clients will receive their funds via Direct Deposit, so banking information will be required.*

*For the handful of clients that pay-by-refund and don't receive funding due to their federal or State refund being intercepted for various reasons (defaulted School loans, Child Support arrears, Liens, etc.), we will contact the client for alternative payment arrangements. If the fees are not paid within 30 days, debt collection actions will commence.*

*If your return is rejected for e-filing and the issue cannot be resolved, then the return will have to be mailed (by client) and other payment methods used*

Legacy Forever Tax and Financial Services

Phone: 301-300-3617; Email: [taxes@legacyforeverllc.com](mailto:taxes@legacyforeverllc.com); Website: [www.legacyforeverllc.com](http://www.legacyforeverllc.com)

**Provide the required bank details below:**

Client Name:	
Bank Name:	
Account Type (Checking or Savings):	
Routing Number:	
Account Number:	

**Acknowledgment and Signature**

By signing below, the Client and Preparer confirm that they have read, understood, and voluntarily agreed to the terms outlined in this Agreement. The Client affirms that all information provided for tax preparation is accurate and complete. The client acknowledges this document as a binding agreement effective as of the final date of execution.

**Client Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Spouse Name (if applicable):** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## Consent to Disclosure of Tax Return Information

\_\_\_\_\_ (“we”, “us” and “our”)  
Printed name of tax preparer

Federal law requires this consent form be provided to you (“you” refers to each taxpayer, if more than one). Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

**You are not required to complete this form to engage our tax return preparation services.** If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

You have indicated that you are interested in applying for a Refund Transfer (“RT”) product from Santa Barbara Tax Products Group, LLC, a subsidiary of Green Dot Corporation (“Processor”) using banking services of Green Dot Bank (“Bank”). In order to have your refund processed by and through Processor, we must disclose all of your 2025 tax return information to Processor and Bank.

If you would like us to disclose your 2025 tax return information to Processor and Bank for this purpose, please sign and date your consent to the disclosure of your tax return information.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to disclose to Processor and Bank all of your 2025 tax return information so that Processor can evaluate and process your application and Bank can provide banking services for the RT product. **You understand that if you are not willing to authorize us to share your tax information with Processor and Bank, you will not be able to obtain an RT product from Processor, but you can still choose to pay us directly to have your tax return prepared and filed.**

**Printed Name of Taxpayer:** \_\_\_\_\_

**Taxpayer Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Printed Name of Joint Taxpayer:** \_\_\_\_\_

**Joint Taxpayer Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

## Consent to Use of Tax Return Information

\_\_\_\_\_ (“we”, “us” and “our”)  
Printed name of tax preparer

Federal law requires this consent form be provided to you (“you” refers to each taxpayer, if more than one). Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

**You are not required to complete this form to engage our tax return preparation services.** If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

For your convenience, we have entered into an arrangement with Santa Barbara Tax Products Group, LLC, a subsidiary of Green Dot Corporation (“Processor”), using banking services of Green Dot Bank, to provide qualifying taxpayers with the opportunity to apply for refund processing services offered by and through Processor. To determine whether these services may be available to you, we will need to use your tax return information by analyzing it and calculating the amount of your anticipated refund.

If you would like us to use your tax return information to determine whether these services may be available to you while we are preparing your return, please sign and date this consent to the use of your tax return information.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to use your 2025 tax return information to determine whether to present you with the opportunity to apply for refund processing services through Processor.

**Printed Name of Taxpayer:** \_\_\_\_\_

**Taxpayer Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Printed Name of Joint Taxpayer:** \_\_\_\_\_

**Joint Taxpayer Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).