



Certified Public Accountants & Business Consultants

Per IRS Security Summit requirements and several state requirements, all banking information must be verified annually. Verify the name of the financial institution, routing transit number, account number, and type of account below for use on your 2017 tax return by completing the following information:

Primary Account:

Name of Financial Institution:

Routing Transit Number:

Account Number:

Type of Account (1= Savings, 2 = Checking, 3=IRA)

Joint Account (Married filing Joint Returns Only): Y or N

Sign and date at the bottom to indicate your verification and return to this office. Do not submit this document to the IRS.

Taxpayer Signature:

Spouse Signature (if applicable):

Date: _____

Some financial institutions do not allow electronic deposits or withdrawals involving individual accounts for joint income tax returns. Be sure and indicate if the account listed on the letter are joint accounts.

Members of American and Pennsylvania Institutes of Certified Public Accountants

1001 East Entry Drive, Suite 200 * Pittsburgh, PA * 15216-2943 * 412.571.0500 * fax: 412.571-1635 * www.markovitz-dugan.com