

Using Bank Products To Grow Your Business

Bank products are a quick and easy way to add revenue to your tax season while giving your clients the option to pay their tax preparation fees with their refund. They integrate with select tax software like MyTAXPrepOffice, and the best part is, enrolling is free, quick, and easy. By offering your clients this stress-free and easy way to pay tax prep fees, you will reach a broader customer base and stay competitive in the tax preparation industry.



How Do Bank Products Work?

Our bank applications are integrated within the program, allowing **fast data entry and smooth data flow**. MyTAXPrepOffice partners with three trusted financial institutions to give you the freedom and flexibility to find the best option for your clients. To get started, you will simply choose the bank that best fits you and your client's needs, complete the application in the software, and wait for your approval. Additionally, you can offer your clients **several disbursement options** to choose from, making it easy for them to receive their refund. You will receive your payments via direct deposit to your account, and the taxpayer will receive the remainder of their refund via their preferred method.

MyTAXPrepOffice not only provides the **lowest bank product fees in the industry**, we also offer tax professionals the ability to provide pre-acknowledgment or **"pre-ack"** loans allowing qualified clients to receive a tax-refund related loan before the IRS has accepted their return.

Financial Institutions

- Santa Barbara TPG
- Refund Advantage
- EPS Financial

Disbursement Options

- Prepaid Card
- Cashier's Check
- Direct Deposit
- Direct2Cash (TPG only)



MyTAXPrepOffice is an asset to any tax professional. It is a fast and efficient service that is beneficial to anyone who uses it.

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Enhance Your Services

By offering bank products, you are gaining an entirely new market of clients, and adding a new service means adding more revenue for your business. Bank products eliminate invoices and waiting for your tax preparation fees. You will receive your payment faster, and your clients will receive their refund in a way that is convenient for them. Most of all, your clients will appreciate no out-of-pocket costs for your services and an easier, more secure way of receiving their refund. In addition to paying tax prep fees from the bank product, clients can apply for an advance up to \$6,000. Promoting these new offers will help grow your business, allow you to stay competitive with the big box tax franchises, and keep your customers happy.



What Are The Benefits?

- Attract new clients with additional service offerings.
- Maintain a competitive edge in the market.
- Let your clients choose the disbursement option that is best for them.
- Take the pressure off of clients by eliminating out-of-pocket cost.
- Receive your fees directly from your client's refund.
- Eliminate collecting late payments or chasing after clients for non-payment.



About MyTAXPrepOffice

At MyTAXPrepOffice, continuous improvement is not just a motto; it drives our brand ideals and values.

MyTAXPrepOffice was conceived to fill a gap in the tax software industry for an online, cloud-based program that is technologically advanced and fills the unique needs of today's tax preparation environment.

Decades old, inflexible desktop programs still require cumbersome installation and downloads, lack mobility, and are more expensive. MyTAXPrepOffice requires no networking or downloads, is **completely mobile**, and provides a fast, accurate, and easy to use tax preparation software that is packed with all the productivity tools you need to run a successful tax business. We offer **affordable plans** for the one person tax office to preparers with multiple offices and numerous preparers. Paired with our client portal and financial product offerings, your business can be anything you imagine it to be.

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Our promise to you...
relentless pursuit of
maximum productivity.

The MyTAXPrepOffice Team