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Dear Client:

Starting September 30, 2025, federal agencies will stop issuing paper checks for all disbursements, which include tax refunds, Social Security benefits, vendor payments, etc. Federal refund checks will also no longer be issued.

All payments made to the government including taxes, fees, fines, etc., must be made electronically.

Options for paying electronically include:

- IRS Direct Pay (www.irs.gov)
- IRS Online account (See enclosed instructions)
- Electronic Federal Tax Payment System (EFTPS). Business, Estates and Trusts must make electronic payments using EFTPS. (See enclosed instructions)
- Electronic funds withdrawal during e-filing
- Payments via debit or credit card (this method will result in additional fees)
- Digital wallets (this method will result in addition fees)

EFTPS requires early enrollment, as a PIN is sent through the mail which takes time. If you are an entity that will need to use EFTPS, we recommend setting up that account as soon as possible.

Please contact us if you have any questions.

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Creating an IRS Online Account

This gives individuals access to their tax records, balances, payment history, and more.

Step-by-Step Setup:

Step 1: Go to IRS Online Account Portal

- Visit: <https://www.irs.gov/payments/your-online-account>

Step 2: Sign in or Create ID.me Account

- The IRS uses **ID.me** for identity verification.
- You'll need:
 - **Photo ID** (driver's license, passport, or state ID)
 - **Smartphone or webcam** for selfie match
 - **Social Security Number**

Step 3: Verify Identity

- Follow prompts to:
 - Uploading ID photo
 - Take a live selfie
 - Answer security questions (sometimes required)

Step 4: Access Account

- After verification, log in to:
 - View balance
 - Make or manage payments
 - Access transcripts
 - Get tax records

Setting up EFTPS (Electronic Federal Tax Payment System)

EFTPS is the U.S. Treasury's secure system to pay federal taxes electronically.

Step-by-Step Setup:

Step 1: Enroll

- Go to: <https://www.eftps.gov/>
- Click **"Enroll"** (top menu bar)
- Choose your entity type: **Individual, Business, or Tax Professional**
- Enter the following:
 - **Taxpayer Identification Number (TIN)** (SSN or EIN)
 - **Bank account info** (routing number, account number)
 - Contact information

Step 2: Wait for PIN by Mail

- You'll receive a **PIN** and **Enrollment Confirmation Number** in the mail (typically within 5–7 business days).

Step 3: Log In and Set Password

- Return to EFTPS.gov, select **"Login"**
- Enter:
 - EIN/SSN
 - PIN (from mail)
 - Internet Password (create this during first login)

Step 4: Schedule Payments

- Once logged in, you can schedule:
 - **Estimated tax payments**
 - **Payroll deposits**
 - **Excise, corporate, or trust taxes**