

Check Reissue

In order to Process we must have the following:

- Copy of Social Security Card and Driver's License
 - **Name and Picture must be visible for bank to process**
- Copy of Check with **"VOID"** written on the **front** AND **back** of the check
- Completed Check Reissue Form with Taxpayer/Spouse and Tax preparer Signatures
 - **Form must contain Branches EFIN, Check Number, and Complete Address of Customer in case check must be mailed for any reason.**

By signing below, I do hereby attest that the completion of this form is an official request for a check reissue for the individual(s) noted above, and I am legally authorized to request the above noted change. I also understand and agree that my request is subject to verification by the Santa Barbara Tax Products Group, LLC of all information provided above.

I understand that it may take 24 to 72 hours to process my request once all documents are received. I agree that TPG and its bank service provider will not be liable for any costs due to delays in processing this request.

Primary Taxpayer Signature	(Print) First and Last Name	Date	
Secondary Taxpayer Signature	(Print) First and Last Name	Date	
EFIN Owner Signature	(Print) First and Last Name	EFIN#	Date

5. **Sign** all necessary signatures.

- Secondary taxpayer is only applicable if there is a spouse.
- You, the preparer, are the EFIN owner.
- EFIN is your 6-digit office identifier. *(If you do not know this #, call our call center)*

Tip: EFIN is located on the Cloud Client, if you do not remember.

Submit all Banking Requests to support@crosslinktaxtech.com. We will reach out once processing is complete.

Check Reissue Form (Current Year Checks Only)

Primary Taxpayer: Customer ID/Last 4
Digits of Taxpayer's SSN:
(customer ID can be obtained at www.sbtpg.com)

Secondary Taxpayer:

Check Number: Check Date: Check Amount:

Current Mailing Address:

(Note: For Lost/Stolen Checks, Use Indemnity Bond)

1. Reason for requesting Check Reissue:

Check damaged	Check negotiable date expired	Check did not print at Preparer's office
Check verified and not paid		
Check amount too large to cash (split into):	2 Checks	3 Checks
2. Select the box indicating how you would like to receive your check:
 - Mail check to Taxpayer(s) address above
 - Send Authorization for the Tax Preparer to print
 - Mail check to my Tax Preparer
3. For **Tax Preparers**, you must witness each Taxpayer's signature, sign form and provide EFIN.
(NOTE: by signing form, Tax Preparers acknowledge being in possession of check being requested for reissue)
E-Mail the following items to: support@sbtpg.com
 - ~ Copy of Unexpired government-issued picture ID (Driver's License, State ID Card, Passport, U.S. Military I.D.)
 - ~ Copy of Social Security Card
 - ~ Voided check copy (front and back)
4. For **Taxpayers**, if ERO is not signing the form, you must **MAIL** all the items listed above plus the **ORIGINAL CHECK** with **"VOID"** on face of check to:

TPG – Professional Division
11085 N. Torrey Pines Rd, Suite 210
La Jolla, CA 92037

(NOTE: Request cannot be processed without ALL the requested documents)

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Secondary Taxpayer Signature	(Print) First and Last Name	Date
EFIN Owner Signature	(Print) First and Last Name	EFIN# Date