

Save time with GO2bank™

A great way to issue Refund Transfers

GO2bank is a great way for clients to receive their tax refund. It helps you too, by eliminating time spent printing and issuing checks. Now, there's no card stock for you to manage!



GO2bank
Member
FDIC

Benefits with Fast Cash Advance

Earn \$39.95*

for each Fast Cash Advance deposited
to a GO2bank account

Benefits for all tax professionals

Save time

when clients choose GO2bank, they do not need to return to collect a check

Fewer calls

GO2bank account notifications help reduce "Where's my refund?" calls

* Paid as long as IRS tax refund is loaded on to the GO2bank account. IRS tax refund deposit must be received by 5/31/22. \$39.95 incentive paid by 6/30/22 for taxpayers with Fast Cash Advance and IRS-funded Refund Transfer deposited onto a GO2bank account. If enrolled through a service bureau, please check with bureau associate for details on incentive payment. Must be enrolled in the standard Refund Transfer program to qualify for standard pricing; all discount programs offered through TPG are subject to other pricing.

Benefits to your clients :

No monthly fees

with eligible direct deposit, otherwise \$5 per month¹

Get pay up to 2 days early

with direct deposit²

Earn up to 7% instant cash back

when you buy eGift Cards from nearly 100 popular merchants in the app³

Overdraft protection up to \$200

with opt-in and eligible direct deposit⁴

Earn over 10x the national savings rate average

High-yield savings account, 1% APY paid quarterly on savings up to \$5,000.⁵

Fast track your tax refund

\$50,000

Sweepstakes

Enter for a chance to win!

Clients are automatically entered to win 1 of 50 \$1,000 prizes when they direct deposit their refund to their GO2bank account

NO PURCHASE NECESSARY. Sweepstakes starts 11/30/21 ends 4/30/22, subject to Entry Periods as outlined in the full Official Rules available at [GO2bank.com/50KTax](https://www.go2bank.com/50KTax). Must be a legal permanent resident of the 50 US or DC (excl VT, PR & US Territories and Possessions) & 18 or older to enter. Prize: \$1,000 to be awarded as credit or a check. Void where prohibited.

GO2BANK™

Must be 18 or older. Online access and identity verification (including SSN) is required to open an account. Mobile number or email address verification and mobile app are required to access all features. See Deposit Account Agreement for fees, terms, and conditions.

1. Monthly fee waived whenever you receive a payroll or government benefits direct deposit in the previous monthly statement period. Otherwise, \$5 per month.
2. Direct deposit early availability depends on timing of payor's payment instructions and fraud prevention restrictions may apply. As such, the availability or timing of early direct deposit may vary from pay period to pay period. The name and Social Security number on file with your employer or benefits provider must match your GO2bank account exactly or we will decline your deposit.
3. Activated, chip-enabled debit card required to purchase eGift Cards. Active GO2bank account required to receive eGift Cards. eGift Card merchants subject to change. See Deposit Account Agreement for details.
4. Activated, chip-enabled debit card, eligible direct deposit and opt-in required. \$15 fee may apply to each eligible purchase transaction that brings your account negative. Balance must be brought to at least \$0 within 24 hours of authorization of the first transaction that overdraws your account to avoid the fee. We require immediate payment of each overdraft and overdraft fee. Overdrafts paid at our discretion and we do not guarantee that we will authorize and pay any transaction.
5. Interest paid quarterly on the average daily balance of savings during the quarter up to a \$5,000 balance and if the account is in good standing. Fees on your primary deposit account may reduce earnings on your savings account. 1.00% Annual Percentage Yield (APY) as of October 2021. APY may change before or after you open an account. See Deposit Account Agreement for terms and conditions. The average national savings account interest rate of 0.06% is determined by the FDIC as of 9/20/21. National rates are calculated based on a simple average of rates paid (uses annual percentage yield) by all insured depository institutions and branches for which data are available. Savings account rates are based on the \$2,500 product tier of insured depository institutions for which data is available. Visit <https://www.fdic.gov/regulations/resources/rates/> to learn more.

Card issued by GO2bank, Member FDIC, pursuant to a license from Visa U.S.A., Inc. Visa is a registered trademark of Visa International Service Association.

GO2bank also operates under the following registered trade names: Green Dot Bank, GoBank and Bonneville Bank. All of these registered trade names are used by, and refer to, a single FDIC-insured bank, Green Dot Bank. Deposits under any of these trade names are deposits with Green Dot Bank and are aggregated for deposit insurance coverage up to the allowable limits.

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Quick start guide for tax professionals

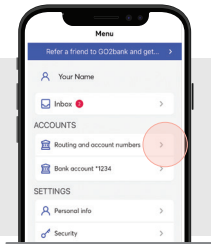
How to offer GO2bank to your clients

- 1 **Display the table tent instructions** and have clients scan the QR code with their phone's camera to access the GO2bank website – **they must use this QR code to be identified as your client.**



- 2 **Clients open a GO2bank account** by following an easy signup process which is completed in minutes. Once approved, they can install the GO2bank app and log in while you complete the tax return.

- 3 **Request bank account information** from clients when prompted in your tax software, and select the GO2bank disbursement option. Ask clients to open the app, select "Menu" and tap "Routing and account numbers" to find their bank account information.



- 4 **Update the tax return** by adding this bank account information to your client's tax return and transmit the return. Clients can set up notifications in the GO2bank app so they know when deposits are received.

IMPORTANT TIPS FOR YOUR CLIENTS

Clients can use their card to make withdrawals or purchases, plus they have 3 ways to access available funds using the GO2bank app even before their card arrives.

- 1 **Pay with a mobile wallet** - log in to the GO2bank app and find "Manage cards" in the menu. Tap "Add to Apple Wallet" or "Add to Google Pay" and follow instructions to connect an account with mobile wallet.
- 2 **Purchase eGift cards in the app** - select from nearly 100 popular merchants plus earn up to 7% cash back.³
- 3 **Pick up cash at Walmart** - select "Need cash now" in the GO2bank app to create a barcode. Take barcode displayed in the app to a nearby Walmart. Show the barcode to a Walmart associate at the Money Center or Customer Service Center to complete the cash withdrawal transaction. Valid government-issued ID required to pick up cash at Walmart.

Setup direct deposit and there are no monthly fees when clients receive a payroll or government direct deposit in the previous monthly statement period.

IMPORTANT TIPS FOR TAX PROS TAX SEASON

- **There is no card stock to manage** - taxpayers open an account online. A personalized, chip-enabled card is mailed to your clients and will arrive in 7-10 days.
- **QR code** - taxpayers must scan the QR code we provided to be identified as your client. If you offer Fast Cash Advance this is required to receive the \$39.95 incentive.
- **Save time** - have clients apply for a GO2bank account while you prepare the return so they have their bank account information before you need to enter it on their return.
- **Accurate info** - make sure clients enter the same name used on their tax return, their correct mailing address and contact information so they can access their account and receive their personalized card in the mail.
- **Not just for pay-by-refund clients** - anyone can apply for a GO2bank account. It's not just for clients using a pay-by-refund product.

Visit our website at sbtpg.com to learn more.