

ADDITIONAL SERVICES

Jackson Hewitt[®]
TAX SERVICES

IT MATTERS WHO DOES YOUR TAXES™

ADDITIONAL
SERVICES

Working Hard for the Hardest Working®

We're in your corner. We dig deep to get you the maximum refund or the lowest tax bill possible. We're here for you all year long, bringing you the products and services you value the most. In a year of changes, don't take chances with your taxes.

MyJH Account

With a MyJH Account (jacksonhewitt.com/myjh) you can:

- Access tax returns that were filed by a Jackson Hewitt Tax Pro
- Track your return status
- Complete your account profile to enable e-Signature

We Guarantee Our Work!

Our guarantees are designed to make your tax prep experience mistake-free and worry-free!

Maximum Refund Guarantee - We'll get you the maximum federal tax refund, or we'll refund your tax prep fees and give you \$100.

Lifetime Accuracy Guarantee® - We'll pay penalties and interest charges if any local Jackson Hewitt® office makes an error preparing your tax return.

When it's time to file, choose the right options for you.

Electronic Filing - Get your refund faster than you would if you mail your tax return to the IRS and reduce the chance of errors when you file. You'll also receive confirmation from the IRS that your return has been acknowledged. Plus, you'll have access to additional products and services available to you only when you e-file.

IRS Direct - When you select IRS Direct, there is no additional cost beyond tax preparation fees and no need to return to the office. You have the option of having your refund deposited into either your bank account or onto a prepaid card. You can also have your refund check mailed directly to your home from the IRS.

Assisted Refund (AR)¹ - With an AR, your refund will be deposited into a temporary bank account. An AR fee and all other authorized fees and amounts will be deducted from your refund² and the remainder disbursed to you by the method you select. An AR can help you manage your refund in four important ways.

- 1. Refund disbursement options:** Choose direct deposit into your personal bank account.
Or you can select a check.
- 2. Tracking:** Track your refund as it moves throughout the system so you'll know exactly when it is available.
- 3. Notification of refund:** With an Assisted Refund, you'll be notified as soon as your refund has been funded, through email, a telephone call or a text message. Ask a Tax Pro about MyJH Alerts. (Message or data rates may apply from your wireless carrier.)
- 4. Record of refund:** Ever have trouble remembering the exact amount of your refund from the year before? With an Assisted Refund, a record of the actual refund amount is automatically retained, allowing you the ability for a year-over-year comparison.

The Assisted Refund is just one more way Jackson Hewitt is working hard for you!

¹An Assisted Refund (AR) permits payment of tax preparation and other fees with your refund upon completion of services. It is not a loan. Bank or Servicer's AR fee and other fees apply. Fee may not apply in IL. Does not include any disbursement fees. AR provided and processed by Republic Bank & Trust Company, Member FDIC. Ask a Tax Pro for details and refund options with no additional cost.

²Payment of tax preparation fees is required upon completion of services: IRS direct - when we file your return; or Assisted Refund - when your refund has been disbursed to you or such later time that it appears that no tax refund will be received.

Balance due payment options made easy

If you owe money at tax time, there are several payment options available.

- **Direct:** Authorize your bank to pay your tax payment directly to the IRS as part of your tax return.
- **Installments:** Request an IRS installment plan with your tax return, which allows you to spread your payments out over time. IRS fees, penalties, and interest may apply.
- **Credit:** Pay your balance due with your American Express® Card, VISA®, MasterCard® or Discover® Card through a third party. Third-party fees may apply.

Ask a Tax Pro for details.

Terms & Conditions

LIFETIME ACCURACY GUARANTEE®: With our Lifetime Accuracy Guarantee ("Accuracy Guarantee"), if an error is made in the preparation of your Covered Tax Return (as defined below), you are entitled to reimbursement of penalties and interest imposed by the applicable tax authority (and not any additional taxes owed or reduction in an expected refund) during your lifetime in connection with the Covered Tax Return, up to an aggregate limit of \$20,000. "Covered Tax Return" means the annual Federal (excluding non-resident), state or local tax return that was prepared by Jackson Hewitt Tax Services or its Franchisee (not applicable to "Jackson Hewitt Online") and filed on or prior to the applicable annual IRS deadline or, if the filing date is properly extended, the IRS extension deadline. To submit a valid claim, you must: (a) notify the Jackson Hewitt Tax Services office through which your in-store return was filed ("Jackson Hewitt Office") in writing or in within 30 days of the date set forth in the first written notice you receive from the applicable tax authority concerning your Covered Tax Return (and promptly at any time you otherwise discover any error in connection with your Covered Tax Return) (a "Claim"); (b) provide copies of all documents related to the Claim or otherwise requested (including any letters from the tax authority and all documentation supporting your tax return); (c) allow Jackson Hewitt, its Franchisee or its authorized representative to investigate and represent you before the applicable tax authority with respect to the penalty, interest, additional tax or refund shortfall, in any manner appropriate, at the expense of Jackson Hewitt, and (d) cooperate and assist in these efforts (including signing appropriate authorizations). You are solely responsible for paying the applicable tax to the appropriate tax authority(ies) in a timely fashion, regardless of your eligibility for subsequent reimbursement under this Accuracy Guarantee. Coverage under this Accuracy Guarantee is subject to prior payment in full of tax preparation fees (which are not subject to refund under this Accuracy Guarantee). Failure to comply with these and other conditions instructed by Jackson Hewitt may result in the denial of your Claim. This Accuracy Guarantee does not apply to the following situations (each an "Exclusion"): (i) in the case of a late filed return (except for an approved IRS extension), interest that accrues from the applicable tax filing deadline until the date you file your return; (ii) any officially published tax law changes after January 1, 2024; (iii) your information is incomplete or, insufficient or your provide inaccurate or false information to your Jackson Hewitt Office or to Jackson Hewitt Inc. or its affiliate; (iv) your tax refund was reduced or not received as a result of a tax lien, judgment, support order, unpaid student or government related loans, back taxes, or any other government offset or collection activity; (v) you are unable to substantiate a deduction, credit, or other position taken on the Covered Tax Return (whether it be a failure to produce sufficient documentation or otherwise); (vi) you failed to timely file the tax return or pay the taxes shown as owing on such return by the applicable due date; (vi) fraud or misrepresentation of any kind, or if you had knowledge of an error at the time you reviewed and accepted the return; (vii) errors caused by software or other technology malfunction; (viii) any reason outside the control of Jackson Hewitt; (ix) errors related to reconciliation of Advance Child Tax Credit; or (x) errors related to the recovery rebate credit from federal Economic Impact Payments (EIP or Stimulus) and/or any changes in income from the prior year(s) and reconciled in the current tax year that may affect the Premium Tax Credit advance for which the taxpayer was eligible to receive, or for income estimates made in any tax year that may affect any tax year reconciliation process in Form 8962 Premium Tax Credit ("Excluded ACA Service"). This Accuracy Guarantee is void if you refile with another tax preparation company. All payments made hereunder will be made directly to the primary taxpayer on the Covered Tax Return via cash, check, or prepaid card. In no event does this Accuracy Guarantee cover additional taxes owed or reduction of a refund. THIS PARAGRAPH DESCRIBES THE LIMIT OF JACKSON HEWITT'S ENTIRE RESPONSIBILITY, OBLIGATIONS AND LIABILITY FOR THE ACCURACY GUARANTEE AND YOUR SOLE AND EXCLUSIVE REMEDY FOR ANY ERRORS OR OMISSIONS IN YOUR COVERED TAX RETURN CAUSED BY JACKSON HEWITT. Coverage shall be determined in the sole judgment of Jackson Hewitt. Most locations are independently owned and operated.

MAXIMUM REFUND GUARANTEE®: If you are entitled to a federal refund on a Covered Tax Return (as defined below) that is larger than what was determined by Jackson Hewitt or any of its Franchisee at the time the Covered Tax Return was submitted to the IRS, Jackson Hewitt will refund the tax preparation fees paid for that Covered Tax Return (excluding other product and service fees) and provide an additional \$100 (the "Maximum Refund Guarantee"). All payments made under this guarantee will be made directly to the primary taxpayer on the Covered Tax Return via cash, check, or prepaid card. "Covered Tax Return" means a Federal (excluding non-resident) tax return for the 2023 tax year that was prepared by Jackson Hewitt Tax Services or its Franchisee (not applicable to "Jackson Hewitt Online") and filed on or prior to the annual IRS deadline or, if the filing date is properly extended, the IRS extension deadline. In order to submit a valid claim (a) you must notify the Jackson Hewitt Tax Services office through which your in-store return was filed ("Jackson Hewitt Tax Office") in writing or in person by the annual IRS deadline for the year of your tax return (and promptly at any time you otherwise discover that your Covered Tax Return may be subject to this guarantee) (a "Claim"); (b) file an amended return with a Jackson Hewitt Tax Office by the annual IRS deadline for the year of your tax return or, if the filing date is properly extended, the IRS extension deadline. The refund amount determined in the amendment must be larger than the refund amount determined in the Covered Tax Return. Same tax facts must apply to the amended return as they did to the Covered Tax Return as determined by Jackson Hewitt. Call 800-234-1040 with any questions or to dispute a determination of your Claim as rendered by the applicable Jackson Hewitt Office. In no event does this Maximum Refund Guarantee cover additional taxes owed. Most locations are independently owned and operated. THIS PARAGRAPH DESCRIBES THE ENTIRE LIMIT OF JACKSON HEWITT'S RESPONSIBILITY, OBLIGATIONS AND LIABILITY WITH RESPECT TO THE MAXIMUM REFUND GUARANTEE AND YOUR SOLE AND EXCLUSIVE REMEDY FOR ANY ERRORS OR OMISSIONS IN YOUR COVERED TAX RETURN CAUSED BY JACKSON HEWITT THAT RESULTED IN A LOWER TAX REFUND THAN THAT WHICH YOU OTHERWISE MAY HAVE BEEN ENTITLED.