

**WHEN EVERY
DOLLAR MATTERS,**

IT MATTERS WHO DOES YOUR TAXES™

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TAX SERVICES

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SET UP YOUR FREE MyJH ACCOUNT

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Set up your FREE MyJH account

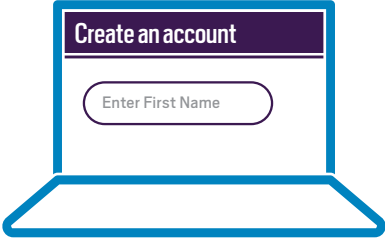
1. Scan this code or go to jacksonhewitt.com/myjh and **create an account**



Create an account



2. **Fill out the form** with your name, email, phone number, and create your username and password



3. **Verify** your email and phone number



We'll email you an access code

Enter Access Code

Continue



And text another to your phone

Enter Access Code

Continue

4. **Complete your account profile** with your Social Security Number and your filing office



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HOW TO eSIGN YOUR TAX RETURN

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eSIGN

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How to eSign your tax return

eSign your tax return



1. **Receive an email or text message*** from us with a link to review your tax return (check your junk folder if you don't see it)



2. **Verify your identity** by answering 3-5 personal questions. Then review your tax return (note: 3 attempt limit, including closing your web browser)



3. Follow prompts to **sign your paperwork where necessary**



4. Once you have finished, your Tax Pro can **file your tax return**

Things you may need to do



For your security, **if filing as 'Married Filing Jointly,'** each spouse must have their own MyJH account, verified with their Social Security number AND unique email.



If you have frozen your credit reports with Equifax, ask for the freeze to be temporarily lifted.

Automated line
(800) 349-9960

OR

Customer care
(888) 298-0045

*Message & data rates may apply

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HOW OUR PRICING WORKS

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PACKAGE PRICING

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How our pricing works

Less complex
Fewer credits & deductions



More complex
More credits & deductions

Base	Deluxe	Complex	Premium	Advanced
Up to two jobs, includes Saver's Credit	Multiple jobs, interest, and dividends	Pensions, IRAs, education credits, and student loan interest	Dependents, itemized deductions, and childcare expenses	Investors, self-employed, rental properties, royalties, and partnerships
Typical tax forms: 1040, 8880, Schedule 1	Typical tax forms: 1040, 8880, 8889, Schedules 1, 2, 3	Typical tax forms: 1040, 1095-A, 5329, 8606, 8863, 8880, 8889, 8962, W-7, Schedules 1, 2, 3	Typical tax forms: 1040, 1095-A, 2441, 5329, 5695, 8283, 8606, 8863, 8880, 8889, 8962, W-7, Schedules 1, 2, 3, Schedule 8812, Schedule A	Typical tax forms: 1040, 1095-A, 2441, 4562, 4684, 4797, 5329, 5695, 8283, 8582, 8606, 8829, 8863, 8880, 8889, 8949, 8962, W-7, Schedules 1, 2, 3, Schedule 8812, Schedules A, B, C, Schedules D, E, F, Schedules K-1, SE

Every package includes:

- ✓ Maximum Refund Guarantee
- ✓ IRS Audit Assistance
- ✓ Online data storage
- ✓ Lifetime Accuracy Guarantee®
- ✓ 24/7 access to documents
- ✓ Year-round service

Additional fees where applicable

Fees may apply for each state/local filing, Earned Income Credit with Dependents, products, and services. Ask a Tax Pro or see our Additional Services section for details. The Advanced package charges per instance for each Schedule C, Schedule F, Schedule K-1, Schedule D transaction, rental property, and royalty.

Form	Description
Form 1040	Main form and framework to display filing status, dependent status, income, deductions, credits, taxes, and tax payments
Form 1095-A	Health Insurance from the Marketplace
Form 2441	Child and Dependent Care Credit
Form 4562	Depreciation and Amortization
Form 4684	Casualties and Theft (Loss of Property or Assets)
Form 4797	Sale of a Business Asset
Form 5329	Pensions/Annuities
Form 5695	Residential energy credits (solar, insulation, exterior windows and doors, etc.)
Form 8283	Noncash charitable contributions in excess of \$500
Form 8582	Passive Activity Loss Limitations for taxpayers who invested into Partnerships, S-Corporations, Rental Properties, etc.
Form 8606	Nondeductible IRAs
Form 8829	Business Use of Home
Form 8863	Education Credits
Form 8880	Saver's Credit (contributions to a 401-k retirement account or IRA)
Form 8889	Pre-tax contributions to a Health Savings Account
Form 8949	Sale of Capital Assets to report each sale of stock, mutual fund, cryptocurrency, etc. (total amounts transferred to Schedule D)
Form 8962	Premium Tax Credit to Reconcile Health Insurance from Marketplace
Form W-7	Application/renewal for Individual Taxpayer Identification Number (ITIN)
Schedule 1	Additional Income & Adjustments to Income (Unemployment Income, Educator Expenses, Student Loan Interest, Gambling Income, etc.)
Schedule 2	Additional Taxes (Pensions/Annuities, Health Insurance from Marketplace, Self-Employment Tax, HSAs, etc.)
Schedule 3	Additional Credits and Payments (Education Credits, Daycare Expenses, Saver's Credit, HSAs)
Schedule 8812	Child Tax Credit and Credit for Other Dependents
Schedule A	Itemized Deductions (e.g. Taxes, Home Mortgage Interest, Charitable Donations, Medical/Dental Expenses)
Schedule B	Interest and Dividends Above \$1,500
Schedule C	Profit or Loss from Business or Self-Employment
Schedule D	Capital Gains and Losses (stocks, virtual currency, bonds, real estate, land, vehicles, etc.)
Schedule E	Supplemental Income and Loss (Rental Properties, Royalties, Partnership Income, etc.)
Schedule F	Profit or Loss from Farming Business
Schedule K-1	Partnerships, S-Corporations, Estates, and Trusts
Schedule SE	Taxes for Self-Employment

ASSISTED REFUND

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Paying for tax prep

	With IRS Direct	With Assisted Refund ¹
Cost	No additional fee	\$54.95 in most states ²
How you pay	Pay today with cash or credit ³	Pay nothing today. Fees come out of your refund ³
Track in MyJH when the IRS accepts your return	✓	✓
Track in MyJH when your refund is paid		✓
Automatic record of your IRS refund in MyJH		✓

No out-of-pocket expenses with an Assisted Refund!¹

¹ An Assisted Refund (AR) permits payment of tax preparation and other fees with your refund upon completion of services. It is not a loan. Bank AR fee and other fees apply. AR provided and processed by Republic Bank & Trust Company, Member FDIC.

² Fee may not apply in IL. Does not include any disbursement fees.

³ Payment 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.

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SERVE[®]
AMERICAN EXPRESS[®]
JACKSON HEWITT[®]
PREPAID DEBIT
ACCOUNT

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SERVE[®]

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It's fast and easy to get your money with a Serve® American Express® Jackson Hewitt® prepaid debit account



Get and use your money fast

IRS refund up to

5 DAYS FASTER

For refunds received Feb 1st - 29th

4 DAYS FASTER

For refunds received
Mar 1st to Apr 15th

than standard
direct deposit.¹

Withdraw

money at an

ATM – FREE

at over 30,000

Moneypass® ATMs²

Shop online or

in stores

– virtually anywhere

American Express®

Cards are accepted

Enjoy the benefits and convenience of Serve

Explore Amex Offers³:

special offers for
shopping,
dining and more

Mobile app

Check your balance,
send money & more

Fraud Protection

If your Serve
Jackson Hewitt card
is ever lost or stolen,
we've got you
covered for
fraudulent purchases.⁴

And there's more!

Did you know...

There is no credit check to get the Serve card

Serve® American Express® Card fee⁴: \$5/month. Learn about more features and benefits at serve.com/jacksonhewitt

¹ Faster access compared to standard tax refund electronic deposit and subject to IRS submitting refund information to the bank before release date. IRS may not submit refund information early.

² Transactions at non-MoneyPass® ATMs have a \$3.50 Serve fee. ATM operator fees may also apply. See [serve.com/jacksonhewitt/atm](https://www.serve.com/jacksonhewitt/atm) for locations and other details.

³ Eligible Card Members can redeem an Amex Offer by first enrolling in the offer in their online account or in the American Express® App and then using their enrolled Card to pay. Only U.S.-issued American Express Consumer and Business Cards and registered American Express Serve® and Bluebird cards may be eligible. We may consider the number of American Express Cards you have opened and closed as well as other factors in making a decision on your eligibility to access Amex Offers. You may not be eligible to access Amex Offers if we, in our sole discretion, determine that you have previously engaged in abuse, misuse or gaming of the Amex Offers program, or any other Amex program. Offers are also available to Additional Card Members and available offers may vary for each eligible Card Member. Please review the terms of each offer for details on how to redeem. For full Program Terms, visit www.americanexpress.com/us/amexoffersterms/

⁴ Monthly fee commences 30 days after activation. If proceeds from a Jackson Hewitt® partner loan product are loaded, no monthly fee is assessed unless additional money is loaded to your card (excluding Jackson Hewitt promotions, but including tax refunds). See Cardholder Agreement for details. (No fee in NY, TX, or VT. No fee in AR until Serve Account is set up online.) Fees subject to change. Visit [serve.com/jacksonhewitt](https://www.serve.com/jacksonhewitt). Must be 18 years of age or older (19 or older in AL, NE).

⁵ Mobile Check Capture by Ingo Money service is provided by First Century Bank, N.A. and Ingo Money, Inc., subject to the First Century Bank and Ingo Money Terms and Conditions and the First Century Bank and Ingo Money Privacy Policy. All checks are subject to approval for funding in Ingo Money's sole discretion. Approval usually takes 3 to 5 minutes but can take up to one hour. Fees apply for approved Money in Minutes transactions funded to your Account. See [serve.com/jacksonhewitt/fees](https://www.serve.com/jacksonhewitt/fees) for details. Additional terms and conditions and limits are associated with your use of the Mobile Check Capture by Ingo Money service through the Serve Mobile app. See [serve.com/jacksonhewitt/legal](https://www.serve.com/jacksonhewitt/legal) for details. Data rates may apply.

⁶ The Serve Money Transfer and Serve Cash Pickup services are provided by Ria (defined below) pursuant to Ria's Terms and Conditions and Ria's Privacy Policy and the American Express Serve Consumer User Agreement. Pickup is available in all 50 United States and Puerto Rico. For Serve Money Transfers, the daily transfer limit is \$2,500 across all of your Serve Accounts. A fee of \$4.99 for each Money Transfer up to \$50, \$8.99 for each Money Transfer of \$50.01- \$1,000, and \$16.99 for each Money Transfer of \$1,000.01-\$2,500 applies. Other limits and terms and conditions apply. Visit [serve.com/moneytransfer](https://www.serve.com/moneytransfer) for complete details. For Serve Cash Pickup transactions, a \$2,500 daily Cash Pickup limit applies; provided, that for Cash Pickup transactions related to tax refunds or refund advances that are Direct Deposited to your Account, the daily Cash Pickup limit will be the lesser of (i) \$2,900 (\$2,500 in Arizona) and (ii) the tax funds amount, until you have withdrawn the tax funds amount. A fee of \$3.49 for each Cash Pickup up to \$500, \$6.49 for each Cash Pickup of \$500.01-\$1,000, and \$9.49 for each Cash Pickup of \$1,000.01-\$2,900, applies. Other limits and terms and conditions apply. Visit [serve.com/cashpickup](https://www.serve.com/cashpickup) for complete details. Serve Money Transfers and Serve Cash Pickup transactions can be picked up during Walmart store hours (typically 8:00 a.m. to 8:00 p.m. local time Monday through Saturday and 10:00 a.m. to 6:00 p.m. Sunday, but hours may vary) at any Walmart MoneyCenter or customer service desk in the State or territory you specified in your order. To pick up a Money Transfer or Cash Pickup transaction, you (in the case of a Cash Pickup transaction) or your recipient (in the case of a Money Transfer) must be at least 18 years of age and present a valid government-issued photo ID and pickup reference number. You or your recipient may also be required to provide proof of address if your or their ID does not contain an address or contains a P.O. Box. For pickup in AZ, NM and OK, additional information, including social security number/ITIN and occupation, may be required. Ria is a registered trademark of Continental Exchange Solutions, Inc. dba Ria Financial Services, licensed as a Money Transmitter by the Department of Financial Services of the State

of New York; licensed by the Georgia Department of Banking and Finance, NMLS ID 920968, LICENSE NUMBER 18943; and authorized independently or through its affiliate, Ria Financial Services Puerto Rico, Inc. NMLS ID 1686588, OCIF LICENSE NUMBER TM-031, to operate as a Money Transmitter in all United States' jurisdictions where it conducts business. American Express Travel Related Services Company, Inc. is not responsible for Ria's acts or omissions in its provision of Serve Money Transfer or Serve Cash Pickup services.

Ria is a registered trademark of Continental Exchange Solutions, Inc. (NMLS ID 920968) dba Ria Financial Services, licensed as a Money Transmitter by the Department of Financial Services of the State of New York; and authorized independently or through its affiliate, Ria Financial Services Puerto Rico, Inc. (OCIF LICENSE NUMBER TM-031/NMLS ID 1686588), to operate as a Money Transmitter in all U.S. jurisdictions where it conducts business. American Express Travel Related Services Company, Inc. is not responsible for Ria's acts or omissions in its provision of Serve Money Transfer or Serve Cash Pickup services.

Currently there are no cash reload locations in the U.S. Virgin Islands.

Serve®. Eligibility, fees and restrictions apply. See the Consumer User Agreement at [serve.com/jacksonhewitt/legal](https://www.serve.com/jacksonhewitt/legal) for details. Serve® American Express® Prepaid Debit Accounts and cards are issued by American Express Travel Related Services Company, Inc., 200 Vesey Street, New York, NY 10285. American Express Travel Related Services Company, Inc. is licensed as a Money Transmitter by the New York State Department of Financial Services. NMLS ID(##) 913828. All trademarks are properties of their respective owners.

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Serve® American Express® Jackson Hewitt® Co-Brand Prepaid Debit Account	
Monthly Card Fee ⁴	\$5.00
Reloading Card with:	
Direct Deposit (deposits load onto the Serve Card)	\$0
Debit/American Express Credit (Cash advance fee may apply)	\$0
Checking/Savings Account (Bank origination fees may apply)	\$0
Paying bills online	\$0
Send and Receive Money	\$0
ATM withdrawals (in-network) "In-network" refers to the MoneyPass® ATM Network.	\$0
Out-of-network ATM withdrawals ²	\$3.50
Cash Reloads	up to \$3.95 (fee varies by retailer)
Foreign transactions	2.7% of each transaction after conversion to US Dollars
Mobile Check Capture by Ingo® Money ⁵	\$0 for money in 10 days; for Money in Minutes, a 1% fee on payroll or government checks with preprinted signatures or 5% fee on other checks; \$5 minimum fee applies
Serve Money Transfer Powered by Ria®	Send up to \$2,500 for \$16.99 per transaction ⁶
Cash Pickup Powered by Ria®	Up to \$9.49 ⁶ per withdrawal; fee varies by withdrawal amount

REFUND ADVANCE LOAN OPTIONS

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Refund Advance

You could get money in minutes on a Serve® American Express® Jackson Hewitt® prepaid debit account¹

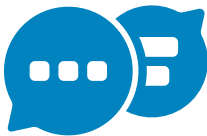
	Money available	Documents needed	Loan amounts	Cost
Early Refund Advance²	12/11/23 to 1/14/24	Current paystub(s)	\$100 (Fee: \$7.30) – \$1,000 (Fee: \$73)	Finance Charge applies (7.3% of loan amount)*
No Fee Refund Advance³	1/2/24 to 2/11/24	W-2 (and other docs) to file taxes	\$250 – \$6,500	0% No loan fee

Loan amount is based on your expected Federal refund less authorized fees and underwriting.

*\$500 Loan Example: \$500 Amount Financed, and if approved, a \$36.50 Finance Charge applies. APR of 35.53%. One payment of \$536.50 is due upon receipt of 2023 tax refund from the IRS and/or state taxing authority.

How it works

1. Apply for an **Early Refund Advance** with your paystub and finish your **No Fee Refund Advance** when you file your taxes.
2. Receive an email/text⁴ from Republic Bank (typically within minutes) with the status of your application(s). Once approved, money will be **available in minutes** on prepaid card or direct deposit in 1-5 days.
3. Your loan(s) and the Early Refund Advance Finance Charge (if applicable) will be **automatically paid back** with your tax refund.



Early Refund Advance available to individuals who apply for a No Fee Refund Advance which requires filing your taxes with Jackson Hewitt beginning Jan 2nd.

See other side for terms and disclosures.

1. If you choose to receive your Refund Advance loan on a prepaid card, you will receive your tax refund on the card.

Serve® American Express® Prepaid Debit Accounts (“Serve Prepaid Debit Account”) and cards are available to U.S. residents who are over 18 years old only (or 19 in certain states) and for use virtually anywhere American Express® Cards are accepted worldwide, subject to verification of identity. Fees apply. Other eligibility requirements and restrictions apply. For complete details please visit serve.com/legal to view the applicable Consumer User Agreement for each Serve Prepaid Debit Account.

Serve Prepaid Debit Accounts and cards are issued by American Express Travel Related Services Company, Inc., 200 Vesey Street, New York, NY 10285. American Express Travel Related Services Company, Inc. is licensed as a money transmitter by the New York State Department of Financial Services. NMLS ID# 913828.

2. The Early Refund Advance (“ERA”) is a loan secured by and paid back with your tax refund and is offered by Republic Bank & Trust Company, Member FDIC, to eligible taxpayers that apply for a No Fee Refund Advance from 12/11/23–1/14/24. ERA loan amounts are determined by your expected Federal refund less authorized fees and underwriting. If approved for an ERA, a Finance Charge will apply. Loan amounts available are \$100, \$300, \$500, and \$1,000. To be eligible for the \$1,000 ERA, your expected Federal refund less authorized fees must be at least \$2,600, and most approved applicants get \$500. ERA is subject to underwriting and approval. Loan proceeds are typically available within same day of approval if disbursed on a prepaid card offered at Jackson Hewitt offices or in 1–5 business days with direct deposit. Terms and restrictions apply. Ask a tax pro for more info about the cost and timing of all filing and product options. Jackson Hewitt is a Rhode Island Licensed Loan Broker and holds other relevant licenses for the locations where this product is offered. Finance Charge is not applicable in CT and NE.

Early Refund Advance Loan amount	Estimated APR	Finance Charge
\$100	35.53%	\$7.30
\$300	35.53%	\$21.90
\$500	35.53%	\$36.50
\$1,000	35.53%	\$73.00

3. The No Fee Refund Advance (“NFRA”) is a loan secured by and paid back with your tax refund and is offered by Republic Bank & Trust Company, Member FDIC, to eligible taxpayers. NFRA Loan amounts are determined by your expected Federal refund less authorized fees and underwriting. Requires filing your taxes with Jackson Hewitt. Available 1/2/23 through 2/19/23. Loan amounts available are \$250, 500, \$750, \$1000, \$1,500, \$2500, \$3,500, \$4,500, and \$6,500 with most approved applicants getting \$1,500. To be eligible for the \$6,500 NFRA, your expected Federal refund less authorized fees must be at least \$6,600. No loan fee applies. Loan proceeds available within same day of approval if disbursed on a prepaid card offered at Jackson Hewitt offices or in 1–5 business days with direct deposit. Terms and restrictions apply. Ask a tax pro for more info about the cost and timing of all filing and product options.

WORRY-FREE GUARANTEE

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Protect your return, yourself, and your wallet.

In 2022, the IRS examined **2.3 million** tax returns and assessed over **\$38 billion** in additional taxes*

Upgrade to Worry-Free Guarantee Tax Protection

Jackson Hewitt stands behind every return we file with our Lifetime Accuracy Guarantee. Upgrade to Worry-free Guarantee Tax Protection for even more support and security.

	Lifetime Accuracy Guarantee® (included with your tax return)	Worry-Free Guarantee Tax Protection (fees apply)
Penalty and interest coverage: We pay penalties and interest if we make a mistake on your return	✓	✓
Tax notice support: If you receive a tax notice, we'll review it, explain it, and make sure we prepared your return correctly.	✓	✓
Lifetime coverage	✓	✓
Refund protection: If the IRS takes back your refund or computes a higher tax bill, we reimburse you up to \$5,000		✓
Audit support: If you are audited, we provide end-to-end case management and professional support at every step.		✓

Ask how to bundle and save.

You'll pay less for Worry-Free Guarantee Tax Protection when you bundle it with Identity Theft Protection (see next page). It's a smart way to protect yourself and your return.

*<https://www.irs.gov/statistics/compliance-presence>

Terms & Conditions

1. Lifetime Accuracy Guarantee® is included at no additional cost with paid tax preparation. Fees apply for Worry-Free Guarantee Tax Protection and Worry-Free Identity Theft Protection. Tax Pros can provide more details.

2. Worry-Free Guarantee Tax Protection provided by Jackson Hewitt: Includes **Audit Security Services**. If you: (1) receive a tax refund or refund adjustment notice from the Internal Revenue Service or a state taxing authority (collectively, a **"Tax Authority"**) that is smaller than the refund amount set forth on your Covered Tax Return (defined below), and/or (2) are required by a Tax Authority to pay a tax liability in excess of the amount set forth on your Covered Tax Return, then Jackson Hewitt Inc. and/or its affiliate ("Jackson Hewitt") will reimburse you for the net amount of such refund shortfall and/or additional tax liability as the case may be (a **"Claim Payment"**), up to a cumulative total of \$5,000 (**"Cap"**). Coverage will be effective through the life of the Covered Tax Return (i.e., until the applicable Federal and/or State statute of limitation for the Covered Tax Return). Any Claim Payment may be (i) reduced to take into account the net effect of any refund to which you are entitled from the applicable Tax Authority following our claim processing, or (ii) increased by the estimated amount of any tax you may owe on the Guarantee Claim Payment amount. Worry-Free Guarantee Tax Protection will become void if payment for such service is not received within 60 days of the date on the Worry-Free Guarantee Tax Protection Customer Agreement (the **"Agreement"**).

"Covered Tax Return" means the Federal (excluding non-resident), state, and/or local tax return(s) for the tax year stated on the Worry-Free Guarantee Tax Protection Customer Agreement prepared by a Jackson Hewitt tax preparer and dated the same date of the Agreement. Reimbursement under the Worry-Free Guarantee Tax Protection does not include penalties and interest. Coverage exclusions apply.

Audit Security Services: If a Tax Authority audits the accuracy of a Covered Tax Return (an **"Audit"**), Jackson Hewitt and/or its service provider will: (i) evaluate the Tax Authority notification letter related to the Audit; (ii) explain the Audit requirements and available options to you; (iii) provide document review, consultation and organization related to the Audit; (iv) draft letters and other necessary correspondence with the Tax Authority as appropriate; and (v) assist with telephone communication with the Tax Authority agent for explanations and discussions during the audit process.

The Agreement and the benefits under Worry-Free Guarantee Tax Protection are not transferable and are subject to additional terms and conditions. See the Worry-Free Guarantee Tax Protection Customer Agreement for full terms and conditions, including coverage exclusions and claims process requirements.

Identity Theft Protection

Powered by



Awarded Best in Class Identity protection Service Provider for Consumers

Identity theft can affect anyone

Criminals know how to exploit anyone—from infants to seniors. Over \$43 billion is lost to identity fraud a year.¹ We can help.

Better protect what matters most

With Identity Theft Protection, powered by ID Watchdog,[®] you have a more convenient and affordable way to help better protect and monitor your identity. You get alerts to potentially suspicious activity and enjoy greater peace of mind knowing you don't have to face identity theft alone.

Monitor & Detect

- Credit Report Monitoring
- Dark Web Monitoring
- Data Breach Notifications
- High-Risk Transactions Monitoring
- Subprime Loan Monitoring

Support & Restore

- Personalized Identity Restoration including Pre-Existing Conditions
- Online Resolution Tracker*
- Lost Wallet Vault & Assistance
- Credit Freeze Assistance
- Solicitation Reduction*
- Unemployment Claims Support

Ask how to bundle and save.

You'll pay less for Identity Theft Protection when you bundle it with Worry-Free Guarantee Tax Protection (see previous page). It's a smart way to protect yourself and your return.

Monitor & Detect

Credit Report Monitoring

Monitors your credit report from Equifax and provides alerts of activity, which if unexpected, could be a sign of potential fraud.

Dark Web Monitoring

Scans websites, chat rooms, and other forums known for trafficking stolen personal and financial information for compromised credentials including Social Security numbers and email addresses. Enter additional credentials such as credit cards, bank accounts, and driver's license to be included in the scanning.²

Data Breach Notifications

Alerts you if your personal information has been associated with a reported data breach or was detected through our dark web scans.²

High-Risk Transactions Monitoring

Helps you better protect against account take overs and fraudulent new accounts opened in your name by alerting you, if we detect in the monitored network,³ a high-risk validation performed by a financial institution using your identity. These validations are typically required for new account openings, adding or changing an account holder, and other high-risk activity such as wire transfers and large withdrawals.

Subprime Loan Monitoring

Monitors your identity and sends an alert if we detect new specialty finance activity in the monitored network using your identity including payday, subprime, high-cost installment, rent-to-own, and other loans outside of the traditional banking system.

Solicitation Reduction

Opt in or out of the National Do Not Call Registry and pre-approved credit offers—reducing junk mail and telemarketing.*

Support & Restore

Personalized Identity Restoration including

Pre-Existing Conditions

Assigns one of our certified, U.S.-based restoration specialists to your identity theft case. We go beyond restoration assistance—your case is personally managed by a dedicated specialist until it is resolved. Includes pre-existing identity theft regardless of when it occurred.

Online Resolution Tracker

View the status of your open identity theft case and keep track of the communication with your assigned certified resolution specialist through your online dashboard*.

Lost Wallet Vault & Assistance

Assists you with canceling and replacing the wallet contents added to Dark Web Monitoring (e.g., credit and debit cards and government-issued identification) in the event of a lost or stolen wallet.

Credit Freeze Assistance

If you have been a victim of identity theft, our Resolution Team can work with you to freeze your credit reports at each of the three nationwide credit bureaus.

Mobile App

Keep a pulse on your personal and financial information by accessing key plan features right from your mobile device. Your phone travels with you, so you won't have to worry about missing an alert when you're on the go*.

Unemployment Claims Support

Provides personalized support from our dedicated unemployment fraud team based on the state that the unemployment fraud occurred in and the type of fraud.

We have English and Spanish-speaking representatives on staff and support over 100 additional languages.

¹Javelin Strategy & Research, "2023 Identity Fraud Study: The Butterfly Effect", Mar 2023.

²There is no guarantee that ID Watchdog is able to locate and scan all deep and dark websites where consumers' personal information is at risk of being traded.

³The monitored network does not cover all businesses or transactions.

*Requires authentication on ID Watchdog portal in order to utilize product feature.

Identity Theft Protection services are only available to the primary taxpayer identified on a covered tax return with a valid Social Security number.

Identity Theft Protection is provided by ID Watchdog® Core Monitoring from Equifax. "Identify Theft" is when your name, address, social security number, debit card, credit card or certain other personally identifiable information ("PII") is stolen, lost, or otherwise used without your knowledge or approval to commit crimes or other fraud in the United States of America. These services will begin approximately 3 business days following the acknowledgment of your filed tax return by the applicable taxing authority and will automatically terminate on April 30, 2025. In order to receive all the benefits of the Identity Theft Protection services, you must register via the online portal and provide full and accurate personal information.

Your purchase and use of the Identity Theft Protection services is governed exclusively by the ID Watchdog Terms of Use at <https://www.idwatchdog.com/terms>

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WF-13965619

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.

HOW TO RATE YOUR TIME AT JACKSON HEWITT

Jackson Hewitt[®]
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IT MATTERS WHO DOES YOUR TAXES™

REVIEWS

Jackson Hewitt[®]
TAX SERVICES

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Share your experience

Review us on 

Even if you've never done it, reviews are easy

1. Go to [googlemaps.com](https://www.google.com/maps) and search for "Jackson Hewitt Near Me"



2. Select this Jackson Hewitt location



3. Scroll to **REVIEWS** and click **WRITE A REVIEW**



4. Give us a rating, write a review, and post it



Thank you!

REFER-A-FRIEND[®]

Money for you
Money for them

Jackson Hewitt[®]
TAX SERVICES

IT MATTERS WHO DOES YOUR TAXES[™]