

Primary Name (as shown on SS Card)		Spouse Name (as shown on SS Card)	
Social Security Number:	Date of Birth:	Social Security Number:	Date of Birth:
Email Address:		Email Address:	
Occupation:		Occupation:	
Can anyone claim you as a dependent? YES or NO Were you married as if Dec. 31, 2025? YES or NO		If you were married, did you live together? YES or NO If you didn't live together, date separated? (MM/DD/YY)	
Address:		City:	State: Zip Code:
Phone (Primary)		Phone (Secondary)	

Dependents: Name: (as shown on SS Card)	DOB	Social Security #	SS Card: Y or N	Relationship	Months in home 2024?
1.					
2.					
3.					
4.					

Can anyone else claim the dependents listed above? (Circle one) YES or NO

Did you, one of your dependents, or anyone on your behalf purchase HEALTH INSURANCE FROM THE MARKETPLACE? (circle one) YES or NO

Do you or your spouse owe the IRS or have Student Loan debt? Who Owes the debt?

Have you received an Identity Protection Pint (IP PIN) from the IRS?

Verify Tax Documents Collected

W-2(s): _____ 1099(s): _____ 1095-A(s): _____ Other forms: _____

Early Tax Refund Advance (ETRA)

_____ I acknowledge I/We are committing to file my/our Income Tax Return for tax year 2025 with Jackson Hewitt and the information provided to obtain an Early Tax Refund Advance on my return is NOT accurate to submit as my final presentation to the Internal Revenue Service (IRS) as my 2025 Tax Return. I fully understand and accept that the Information presented at this time only serves as an ESTIMATE.

_____ ALL actual W-2s and other required documents based on my tax situation must be presented to Jackson Hewitt for final submission to the IRS and to receive the remaining balance of my Early Tax Refund Advance.

_____ I accept that the required documents used to complete my 2025 tax return could alter the ESTIMATED Refund and tax preparation fees of actual final tax return.

_____ I understand that I am only eligible to apply for one promotion in connection to my 2025 income tax return.

_____ If my Early Tax Refund Advance is completed with only Self Employment income then my 2025 income tax return will automatically be sent to the IRS for processing on January 2, 2026.

I _____ (print name) I understand the information provided must be complete and accurate, my entire refund could be held up for processing by the IRS should the information I am providing not match what is shown in IRS records.

Incorrect information will delay your refund. This Jackson Hewitt office will never knowingly assist you in filing a fraudulent tax return. If filing your 2025 income tax return and you cannot provide all your income and expenses at this time, you should not file this return. If you choose to file and later find you have additional information you will need to AMEND your original tax return at a cost of \$100 in additional tax preparation fees. Any changes to your original tax return could result in additional tax owed to the IRS or state taxing authority.

By signing below, I certify that all information provided is true, accurate and complete.

Signature: _____ Date: _____