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|---|-----------------------|---|-----------------------|
| 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 | | If you were married, did you live together? YES or NO | |
| Were you married as if Dec. 31, 2025? YES or NO | | If you didn't live together, date separated? (MM/DD/YY) | |
| Address: | | City: | State: |
| 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: _____

Tax Refund Advance (TRA): January 2, 2026 – April 15, 2026

The Tax Refund Advance is a loan secured by a client's tax refund and offered by First Century Bank, available at participating Jackson Hewitt locations. A finance charge applies. The loan is available from January 2, 2026 through April 15, 2026. Loan amounts range from \$500.00 - \$3,500.00. First Century Bank cannot provide final approval status and loan amount for the Tax Refund Advance loan until the client provides Jackson Hewitt all necessary information & forms and electronically files their tax return.

_____ ALL actual W-2s and other required documents based on my tax situation must be presented to Jackson Hewitt for final submission of my tax return to the Internal Revenue Service in order apply for the Tax Refund Advance.

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

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: _____