

Things to Know:

- No Fee Tax Refund Advance Loan (NFTRA) ends on February 16, 2025.
- NFTRA has no loan fees; 0% APR.
- Clients may receive up to \$3,500.
- Clients may be prequalified for a specific loan amount; however, this is not a guaranteed amount.
- Provide prequalified amount ONLY if requested.
- To view the prequalified amount for an NFTRA, use Customer Lookup/Disbursement/Refund Advance Information: Pre-qualified Amount.

SAVE	REMOTE ESIGN	PREACKS	EXTENSIONS
ice - SNS Paystub Loan \$1500.00 RA Pre-Approval Amount \$1500.00 W2 Availability 0 of 1			

NOTE: Do NOT refer to the RA Pre-approved amount displayed in Return Conversion/Details tab. It is not accurate currently.

- Clients must bring their government-issued photo ID to verify identity, or you can use the scanned version that was scanned into the tax return when they applied for Early Tax Refund Advance this season.
- Clients must provide all their tax documents to complete their tax return. For example:
 - Earning statements like a W-2s and 1099s.
 - If enrolled in a healthcare plan via the Health Insurance Marketplace, they'll need to provide Form 1095-A.
 - If they had an IRS-issued Identity Protection PIN last year, they'll need the information for this year.
- Be prepared to use these eServices when calling clients:
 - **Return Conversion** to manage client contact.
 - **Appointment Calendar** to record an appointment.
 - **Customer Lookup** to view the client's NFTRA prequalified loan amount (if they are prequalified and request this amount).
 - **Customer Lookup** to send clients a Document Exchange link via email/text so they can share files such as W-2s, 1099s, etc.

For more information about the NFTRA loan product or the process, use the Refund Advance Flipbook page and [these articles on AskJH.](#)



When making calls, use these best practices:

- Create a sense of urgency.
- Ask open-ended questions that solicit a response other than Yes/No.
- Promote the value of filing their return with Jackson Hewitt to include processing the No Fee Tax Refund Advance Loan, which gives them access to money weeks before their refund arrives – and as the name indicates has no loan fee; 0%APR!
- Discuss the convenience of sharing documents remotely before their appointment, using Document Exchange or their MyJH account.

Script #1: Approved ETRA, Prequalified for NFTRA. **No Appointment.**

Hi, this is {your name} with Jackson Hewitt Tax Services. Is {client name} available?

If client is available:

Promote the value of No Fee Tax Refund Advance and having taxes prepared at Jackson Hewitt

Hi, this is {Your Name} from Jackson Hewitt Tax Services. Hope you enjoyed the holidays, and your Early Tax Refund Advance Loan came in handy! I'm calling to remind you about the No Fee Refund Advance Loan. You may be able to receive a loan for up to \$3,500 and there are no loan fees; it's 0%APR. Plus, when you file your taxes with us, you are automatically entered into our sweepstakes for a chance to double your tax refund!

We just need your tax documents to complete and file your return. Once your return is acknowledged by the IRS, **even before IRS opens for e-file**, the No Fee Tax Refund Advance Loan application will be processed. If you're approved, you'll have money within minutes, if you chose a Serve Card. Only Jackson Hewitt has a Money Today Guarantee. If you chose Direct Deposit, it'll be a few days.

Promote Document Exchange and Appointment Options

Do you have all your tax documents?

Yes: I can text and email a link, and you can send them ahead of time. We may be able to finish your return over the phone and save you a trip to the office. Simply take a picture of your documents or attach the actual file if you have it. The link is good for 8 hours. Would you like me to send a link? {If client says Yes, access Customer Lookup and send the link.}

No: No worries. You can just bring them with you. If you prefer, call us when you get them, and we can discuss how you can send them remotely. We may be able to finish your return over the phone and save you a trip to the office.

Schedule Appointment

No Fee Refund Advance ends February 16th, so let's get an appointment scheduled before we get fully booked. What works best for you; daytime or evening? What day works best? What time works best?

{Access Appointment Calendar to record a Follow-up Appointment. Add a note if the client is sending their documents and requests to complete their return over the phone. Add the note in the Appointment Calendar and in Return Conversion. Change the Call Disposition in Return Conversion to "Appointment Scheduled".}

Close the Call

Let me quickly run down what you need to bring or send us. Some may have been scanned in when you applied for the Early Tax Refund Advance, but just to be safe, have them available again:

- Your government-issued photo ID, like your driver's license to verify your identity.
- Social Security cards for you and anyone else on the return.
- All tax documents, such as W-2s and 1099s, info about your healthcare, details about your IP PIN, if you have one and any IRS notices.

We will see you {appointment date and time}. Thanks again. Have a great day!

Script #2: Approved ETRA, Prequalified for NFTRA. **Has an Appointment.**

Hi, this is {your name} with Jackson Hewitt Tax Services. Is {client name} available?

If client is available:

Promote the value of No Fee Tax Refund Advance and having taxes prepared at Jackson Hewitt

Hi, this is {Your Name} from Jackson Hewitt Tax Services. Hope you enjoyed the holidays, and your Early Tax Refund Advance Loan came in handy! I'm calling to remind you about the No Fee Refund Advance Loan. You may be able to receive a loan for up to \$3,500 and there are no loan fees; it's 0%APR. Plus, when you file your taxes with us, you are automatically entered into our sweepstakes for a chance to double your tax refund!

We just need your tax documents to complete and file your return. Once your return is acknowledged by the IRS, **even before IRS opens for e-file**, the No Fee Tax Refund Advance Loan application will be processed. If you're approved, you'll have money within minutes, if you chose a Serve Card. Only Jackson Hewitt has a Money Today Guarantee. If you chose Direct Deposit, it'll be a few days.

Promote Document Exchange and Appointment Options

Do you have all your tax documents?

Yes: I can text and email a link, and you can send them ahead of time. We may be able to finish your return over the phone and save you a trip to the office. Simply take a picture of your documents or attach the actual file if you have it. The link is good for 8 hours. Would you like me to send a link? {If client says Yes, access Customer Lookup and send the link.}

No: No worries. You can just bring them with you. If you prefer, call us when you get them, and we can discuss how you can send them remotely. We may be able to finish your return over the phone and save you a trip to the office.

Confirm Appointment

I want to confirm your appointment for {date, day, time}. It gets crazy around here in January so I'm glad we've got that appointment confirmed.

{Access Appointment Calendar to make any adjustments. Add a note, if the client is using Document Exchange to send documents. Add the note in the Appointment Calendar and in Return Conversion. Change the Call Disposition on Return Conversion to reflect that the appointment has been confirmed.}

Close the Call

Let me quickly run down what you need to bring or send us. Some may have been scanned in when you applied for the Early Tax Refund Advance, but just to be safe, have them available again:

- Your government-issued photo ID, like your driver's license to verify your identity.
- Social Security cards for you and anyone else on the return.
- All tax documents, such as W-2s and 1099s, info about your healthcare, details about your IP PIN, if you have one and any IRS notices.

We will see you {appointment date and time}. Thanks again. Have a great day!

Script #3: Declined for ETRA, Prequalified for NFTRA. **No Appointment** or **Has Appointment**.

Hi, this is {your name} with Jackson Hewitt Tax Services. Is {client name} available?

If client is available:

Promote the value of No Fee Tax Refund Advance and having taxes prepared at Jackson Hewitt

Hi, this is {Your Name} from Jackson Hewitt Tax Services. We want to remind you that you are prequalified for the No Fee Tax Refund Advance. You may be able to receive a loan for up to \$3,500 and there are no loan fees; it's 0%APR. Plus, when you file your taxes with us, you are automatically entered into our sweepstakes for a chance to double your tax refund!

We just need your tax documents to complete and file your return. Once your return is acknowledged by the IRS, **even before IRS opens for e-file**, your No Fee Tax Refund Advance Loan will be processed. If you're approved, you'll have money within minutes, if you chose a Serve Card. Only Jackson Hewitt has a Money Today Guarantee. If you chose Direct Deposit, it'll be a few days.

Promote Document Exchange and Appointment Options

Do you have all your tax documents?

Yes: I can text and email a link, and you can send them ahead of time. We may be able to finish your return over the phone and save you a trip to the office. Simply take a picture of your documents or attach the actual file if you have it. The link is good for 8 hours. Would you like me to send a link? {If client says Yes, access Customer Lookup and send the link.}

No: No worries. You can just bring them with you. If you prefer, call us when you get them, and we can discuss how you can send them remotely. We may be able to finish your return over the phone and save you a trip to the office.

Schedule or Confirm Appointment

{Access Appointment Calendar to make any adjustments. Add a note, if the client is using Document Exchange to send documents. Add the note in the Appointment Calendar and in Return Conversion. Change the Call Disposition on Return Conversion to reflect that the appointment has been scheduled/confirmed.}

Close the Call

Let me quickly run down what you need to bring or send us. Some may have been scanned in when you applied for the Early Tax Refund Advance, but just to be safe, have them available again:

- Your government-issued photo ID, like your driver's license to verify your identity.
- Social Security cards for you and anyone else on the return.
- All tax documents, such as W-2s and 1099s, info about your healthcare, details about your IP PIN, if you have one and any IRS notices.

We will see you {appointment date and time}. Thanks again. Have a great day!

Script #4: Declined for ETRA, NOT prequalified for NFTRA. No Appointment or Has Appointment.

Hi, this is {your name} with Jackson Hewitt Tax Services. Is {client name} available?

If client is available:

Promote the value of having taxes prepared at Jackson Hewitt

Hi, this is {Your Name} from Jackson Hewitt Tax Services. We started your return and I'd really like to help you out by sharing a few things:

- Having us prepare your taxes this year will improve your chance of being approved for an Early Tax Refund Advance loan and No Fee Tax Refund Advance next year, because we'll have a relationship and more information.
- Your tax return is almost done. The sooner it's filed, the sooner you'll receive your tax refund. We just need your tax documents to complete and file your return.
- When you file your taxes with us, you are automatically entered into our sweepstakes for a chance to double your tax refund! We already guarantee your biggest refund. And you could double it!
- {Share details of local discounts or offers for clients in this situation. Your supervisor can provide details.}

Promote Document Exchange and Appointment Options

Do you have all your tax documents?

Yes: I can text and email a link, and you can send them ahead of time. We may be able to finish your return over the phone and save you a trip to the office. Simply take a picture of your documents or attach the actual file if you have it. The link is good for 8 hours. Would you like me to send a link? {If client says Yes, access Customer Lookup and send the link.}

No: No worries. You can just bring them with you. If you prefer, call us when you get them, and we can discuss how you can send them remotely. We may be able to finish your return over the phone and save you a trip to the office.

Schedule or Confirm Appointment

{Access Appointment Calendar to make any adjustments. Add a note, if the client is using Document Exchange to send documents. Add the note in the Appointment Calendar and in Return Conversion. Change the Call Disposition on Return Conversion to reflect that the appointment has been scheduled/confirmed.}

Close the Call

Let me quickly run down what you need to bring or send us. Some may have been scanned in when you applied for the Early Tax Refund Advance, but just to be safe, have them available again:

- Your government-issued photo ID, like your driver's license to verify your identity.
- Social Security cards for you and anyone else on the return.
- All tax documents, such as W-2s and 1099s, info about your healthcare, details about your IP PIN, if you have one and any IRS notices.

We will see you {appointment date and time}. Thanks again. Have a great day!

Script #5: Start but no Refund Advance loan application processed. No Appointment or Has Appointment.

Hi, this is {your name} with Jackson Hewitt Tax Services. Is {client name} available?

If client is available:

Promote the value of having taxes prepared at Jackson Hewitt

Hi, this is {Your Name} from Jackson Hewitt Tax Services. I know you started your return with us earlier in the tax season. I'd really like to help you out by sharing a few things:

- Having us prepare your taxes this year will improve your chance of being approved for an Early Tax Refund Advance loan and No Fee Tax Refund Advance next year, because we'll have a relationship and more information.
- Your tax return is almost done. The sooner it's filed, the sooner you'll receive your tax refund. We just need your tax documents to complete and file your return.
- When you file your taxes with us, you are automatically entered into our sweepstakes for a chance to double your tax refund! We already guarantee your biggest refund. And you could double it!
- {Share details of local discounts or offers for clients in this situation. Your supervisor can provide details.}

Promote Document Exchange and Appointment Options

Do you have all your tax documents?

Yes: I can text and email a link, and you can send them ahead of time. We may be able to finish your return over the phone and save you a trip to the office. Simply take a picture of your documents or attach the actual file if you have it. The link is good for 8 hours. Would you like me to send a link? {If client says Yes, access Customer Lookup and send the link.}

No: No worries. You can just bring them with you. If you prefer, call us when you get them, and we can discuss how you can send them remotely. We may be able to finish your return over the phone and save you a trip to the office.

Schedule or Confirm Appointment

{Access Appointment Calendar to make any adjustments. Add a note, if the client is using Document Exchange to send documents. Add the note in the Appointment Calendar and in Return Conversion. Change the Call Disposition on Return Conversion to reflect that the appointment has been scheduled/confirmed.}

Close the Call

Let me quickly run down what you need to bring or send us. Some may have been scanned in when you applied for the Early Tax Refund Advance, but just to be safe, have them available again:

- Your government-issued photo ID, like your driver's license to verify your identity.
- Social Security cards for you and anyone else on the return.
- All tax documents, such as W-2s and 1099s, info about your healthcare, details about your IP PIN, if you have one and any IRS notices.

We will see you {appointment date and time}. Thanks again. Have a great day!

“What if” Scripts

If it goes to voicemail, leave this message:

This is {your name} from Jackson Hewitt Tax Services calling to remind you to come back for the No Fee Tax Refund Advance, 0% APR loan. You could get up to \$3,500! Offer ends soon, so please call us back at ###-###-####.

If the client is not available and someone else answers:

Please remind {client name} to come back for the No Fee Tax Refund Advance loan offered by Republic Bank. They could get up to \$3,500. This opportunity ends on February 16, and we don't want {First Name} to miss out. They can return my call ###-###-####. Thanks.

The client says they are too busy to come in:

No problem! You can drop your documents by our office, or I can send you a link via email or even text that is good for 8 hours. That way, we can do some of the tax preparation in advance before you come in. We may be able to finish over the phone, remotely, and save you a trip to the office. {Access Customer Lookup and send the link.}

The client tells you they are going to file on their own instead:

Remember that:

Your Tax Pro is fully up to date on the tax changes, so we guarantee we'll get you the biggest refund, and provide you with a Lifetime Accuracy Guarantee. Also, we're available year-round, if you need us for anything including copies of your tax returns, help complete your withholding for your job, and more.

If you don't have time for an appointment, I can email or text you a link to send us your tax documents and we may be able to complete everything over the phone and remotely.

Plus, you're automatically entered in our Double Your Refund Sweepstakes when you file with us.

I bet you have better things to do with your time and would love the opportunity to prepare your taxes for you, so you don't have to worry about it. Let's make an appointment.

The client informs you they do not have their W-2 (or other tax documents):

No problem, we can schedule an appointment for a week or so from now. Hopefully you'll have your W-2 by then. Better to get an appointment scheduled than not have one, because tax season gets really busy and the sooner we can get your tax return completed and filed the sooner you'll receive your No Fee Refund Advance Loan, if approved / tax refund.}

Tell me more about the Sweepstakes

Just file your return and you're entered in our Double Your Refund Sweepstakes. You could win an amount matching the size of your refund – up to \$10,000. We're also giving away thousands more in weekly prizes. It's our way of celebrating 40+ years of helping people with their taxes. Here's a link to visit if you'd like more specific information and read about some of our past winners: www.jacksonhewitt.com/legal/sweepstakes. If you chose a Serve Card as your disbursement option, you receive an extra entry – so you double your chances!

I never received my refund from last year

We can help you by investigating that. Let me do a little more research and get back to you. {Use Customer Lookup to investigate the situation and return the clients call with as much information as you can gather.}

Product Disclaimers:

No Fee Tax Refund Advance

The No Fee Tax Refund Advance (NFTRA) is a loan secured by, and paid back with, your tax refund and is offered by Republic Bank & Trust Company, to eligible taxpayers. NFTRA loan amounts are determined by your expected Federal refund, less authorized fees and underwriting. Requires filing your taxes with Jackson Hewitt. Available 1/2/25 through 2/16/25. Loan amounts available are \$250, \$500, \$750, \$1000, \$1,500, \$2,500, \$3,000, and \$3,500. To be eligible for the \$3,500 NFTRA, your expected Federal refund less authorized fees must be at least \$3,600, and most approved applicants get \$500. No loan fee applies. Loan proceeds available within the 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 terms and more info about the cost and timing of all filing and product options.

Double Your Refund Sweepstakes

NO PURCHASE NECESSARY TO ENTER OR WIN and won't improve chances of winning. Sweepstakes open to legal U.S. residents (excluding P.R. and other territories), age 18 + who file a Federal tax return. Weekly entry periods from 1/1– 4/15/25. Grand Prizes (refund match amounts) max of \$10,000 per winner, min \$1,500. For entry methods and terms, see official rules at jacksonhewitt.com. Sponsor: Jackson Hewitt Inc., 10 Exchange Place, 27th Floor, Jersey City, NJ 07302