Thank you for participating in IRS e-file.

1. Your federal income tax retum for

|  |  |
| --- | --- |
| Form 9325  (Rev. January 2017) | Department of the Treasury - Internal Revenue Service  Acknowledgement and General Information for Taxpayers Who File Returns Electronically |

REESE. CLAUDE W & JERDINE. BEVERLY D

Taxpayer Name

Taxpayer Address (optional)

2021 was filed electronically with the IRS

Submission Processing Center. The electronic filing services were provided by Jackson Hewitt Tax Service

1. Your return was accepted onusing a Personal Identification Number (PIN) as your electronic signature. You entered a PIN or authorized the Electronic Retum Originator (ERO) to enter or generate a PIN for you.

The Submission ID assigned to your retum is

1. Your retum was accepted on. Please allow 4-6 weeks for the processing of your retum. The Earned Income Credit or a dependent's exemption on your return may be reduced or disallowed due to a child's name and social security number mismatch.
2. Your electronic funds withdrawal payment was accepted for processing.
3. Your electronic funds withdrawal payment was not accepted for processing. Refer to the "If You Owe Tax" section.
4. Your Form 4868, Application for Automatic Extension of Time to File U.S. Individual Income Tax Retum, was accepted on The Submission ID assigned to your extension is

PLEASE DO NOT SEND A PAPER COPY OF YOUR RETURN TO THE IRS. IF YOU DO, IT WILL DELAY THE PROCESSING OF THE RETURN.

If You Need to Make a Change to Your Return

If you need to make a change or correct the return you filed electronically, you should send a Form Amended U.S. Individual Income Tax Retum, to the IRS Submission Processing Center that processes paper retums for your area. The address is available at www.irs.gov, or you can call the IRS toll-free at 1-800-829-1040.

If You Need to Ask About Your Refund

The IRS notifies your Electronic Return Originator (ERO) when your retum is accepted, usually within 48 hours. If your return was not accepted, the IRS notifies your ERO of the reasons for rejection. If it has been more than three weeks since the IRS accepted your retum and you have not received your refund, go to www.irs.gov and click on 'Where's My Refund?" to view your refund status. Exception: If box 3 above is checked, please allow 4 to 6 weeks for processing of your return. A notice will be sent to you advising of changes to your retum.

Also, you can call the TeleTax line at 1-800-829-4477, for automated refund information. You should have available the first social security number shown on your return, your filing status, and the exact amount of the refund you expect. TeleTax gives you the date for mailing or depositing your refund. You should receive your refund check within 30 days of the date given by TeleTax, or within one week of that date, if you chose direct deposit. If you do not receive it by then, or if TeleTax does not give your refund information, call the Refund Hotline at 1-800-829-1954.

www.irs.gov Form 9325 (Rev. 1-2017)

F 12/15/16

The IRS uses refunds to cover overdue taxes and notifies you when this occurs. The Fiscal Service offsets refunds through the Treasury Offset Program to cover past due child support, federal agency non-tax debts such as student loans and state income tax obligations. Fiscal Sen.'ice sends you an offset notice if it applies your refund or part of your refund to non-tax debts. If you have questions about the offset, contact the agency identified in the notice. You may also call the Treasury Offset Program Call Center at 1-800-304-3107, if you have additional questions.

If You Owe Tax

If your return has a balance due, you must pay the amount you owe by the prescribed due date. If you paid by electronic funds withdrawal (direct debit) or by credit card, no voucher is needed. The credit card service providers will charge a convenience fee based on the amount of taxes you ar paying. The fees and the type of credit or debit cards accepted may vary between providers. You will be told the amount of the fee during the transaction and you will be given the option to either continue or end the transaction. For information on paying your taxes electronically, including by credit or debit card, go to www.irs.gov/e-pay.

If you are not paying electronically you may use the Form 1040-V, Payment Voucher, which you can obtain from your Electronic Return Originator. If the IRS does not receive your payment by the prescribed due date, you will receive a notice that request full payment of the tax due, plus penalties and interest. If you can not pay the amount in full, complete Form 9465, Installment Ageement Request, which you may file electronically.

To apply for an installment agreement online, go to www.irs.gov.You may also order Form 9465 by calling 1-800-TAX-FORM (1-800-829-3676). If approved, the IRS charges a user fee to set up an installment agreement.

If You Need to Inquire About Your Electronic Funds Withdrawal Payment

You may call 1-888-353-4537, to inquire about the status of an electronic funds withdrawal payment. If there is a change to the bank account information included on your return, you should call this number to cancel a scheduled payment. You should have available the social security number of the first person listed on the tax return, the payment amount, and the bank account number. Cancellation requests must be received no later than 11:59 p.m. E.T. Eastern time, two business days prior to the scheduled payment date.

Tax Refund Related Financial Products

Financial institutions offer a variety of financial products to taxpayers based on their refunds. Contracts for financial products are between you and the financial institution. The IRS is not associated with the contract. If you have questions about tax refund related products, contact your Electronic Retum Originator or the lender.

Instructions for Electronic Return Originators

Line 2 - PIN Presence Indicator - Check box 2 if the taxpayer entered a PIN or authorized the ERO to enter or generate the PIN for the taxpayer, and the Acknowledgement File PIN Presence Indicator is a "Practitioner PIN," "Self-Select PIN" or "Online Filer PIN." Form 8879, IRS e-file Signature Authorization, is required if the ERO enters or generates the PIN or if the Practitioner PIN method is used.

Use Form 8453, U.S. Individual Income Tax Transmittal for an IRS e-file Return, to send required paper forms or supporting documentation listed next to the form check boxes (do not send Forms W-2, W-2G, or 1099R).

Line 3 - Exception Processing - Check box 3 if the Acknowledgement File Acceptance Code equals "Exception." The acceptance code indicates that this return has been previously rejected and this subsequent submission still has invalid data.

Line 4 - Payment Acknowledgement Literal - Check box 4 if the taxpayer requested to use electronic funds withdrawal to pay the balance due, and the Acknowledgement File Payment Acknowledgement Literal field equals "Payment Request Received."

Line 5 - Payment Acknowledgement Literal - Check box 5 if the taxpayer requested to use electronic funds withdrawal to pay the balance due, and the Acknowledgement File Payment Acknowledgement Literal field does not equal "Payment Request Received." If box 5 is checked, inform the taxpayer that he/she must pay by check, money order, debit card, or credit card.

Note: EROs can use the Acknowledgement File information, translated by the transmitter, to complete Form 9325.

F 12/15/16 WYM. irs .gov Form 9325 (Rev. 1-2017)

# Federal Forms Barcode Page

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JHFEDERLOII

Tax Year: 2021 Federal Return Recap C Primary : 385-60-6363 CLAUDE W REESE Page: 1 spouse : 376-62-8928 BEVERLY D JERDINE



\* Form W-2 \*\* Form 1040-SR, Pgl \*

Employer EIN 45-5607604Federal fil ing MFJ

Employer Name PRUDENTIAL SECURITYTP First Name CLAUDE W

Wages 4,240TP Last Name REESE

Fd Tax Wi thheld 67TP SSN 385-60-6363

SS Wages 4,240SP First Name BEVERLY D

SS Tax Wi thheld 263SP Last Name JERDINE

Medi Wages 4 240SP SSN 376-62-8928

Med Tax Witheld 61Street Address 16810 CARLISLE ST

Ernployer Num 455607604City State Zip DETROIT, Ml 48205

State Wages 4,240 TP 65+ CB 

Local i ty Det roi tGross Wages 15,118 Local Wages 4 240Tax Pen 9,542 Local Whldg 102Total Incane 24,660 Sch 1 adj NONE

\* Form W-2 \*Adj Gross Inc 24,660

Employer EIN 36-4854464Tot No CB 1

Enployer Name CATO ENPLOYEE SERVICES

Control Nurrber 000150916\* Form 1040-SR, \*

Wages 10,878Fi I ing name CLAUDE W REESE

Fd Tax Withheld 876TP SSN 385-60-6363

SS Wages 10,878I tem/Std Ded 26,450 SS Tax Wi674 Char Contr StdD 200 Medi Wages 10,878Char Contr StdD 26,650 Med Tax Witheld 158Adj Gross Inc 26,650

Errployer Num 194201Txbl Income NONE

State Wages 10,878Tax NONE

St Whidg 462Inc Tx Less Cr

Total Tax NONE \* Form 1099-R \*Fed Tax Whid 943 TP Phone Nunber (800) 378-4015EIC 414

Payer Name FIDELITY INVESTÆNTRecovery Rebate 2,800 Payer IDN0 04-3275867Tot Pymts Sch 3 NONE Gross Distrib 6,171Tot Ref cr 3,214

Txbl Amt 6,171Tot Payments 4, 157

Dist Code 7

* Form 1040-SR, Pg3 \*
* Form 1099-R \*Fi I ing name CLAUDE W REESE

TP Phone Number (800) 378-4015TP SSN 385-60-6363

Payer Name FIDELITY INVESTE-NTAmt Overpaid 4,157

Payer IDN0 04-3275867TP Refund 4, 157

Gross Distrib 3,371Est Tx Pnlty NONE

Txbl Amt 3,371TP Occupat ion SECURITY GUARD

Dist Code 7Sp Occupat ion RETAIL STORE ASSOCIATE

Date/Time Printed: 04/16/2022 PM EDT

Tax Year: 2021 Federal Return Recap

Primary : 385-60-6363 CLAUDE W REESE Page: 2 spouse : 376-62-8928 BEVERLY D JERDINE

* Form 8867,

Fi I ing Name CLAUDE W REESE & BEVERLY D JERDINE Taxpayer SSN 385-60-6363

* Form 8867,

Fi ling Name CLAUDE W REESE & BEVERLY D JERDINE

Taxpayer SSN 385-60-6363

* Form 1040 - Standard Deduction \*

TP 65+ CB YES

RegStdDed 25, 100 Earn or Std 25,100 Add Std Ded 1 ,350

Std Ded 26,450

Date/Time Printed: 04/16/2022 PM EDT

eligible to receive the Audit Security Guarantee, then Jackson Hewitt Inc. reserves the right to refund a portion of the fee for the Worry-free-Guarantee Platinum plan that is allocated to the Audit Security Guarantee (as determined by Jackson Hewitt Inc.) without further obligation or liability to you.

If you cancel your Worry-free Guarantee Platinum or change it to a different Worry-free Guarantee plan, then this Audit Security Guarantee will be automatically terminated.

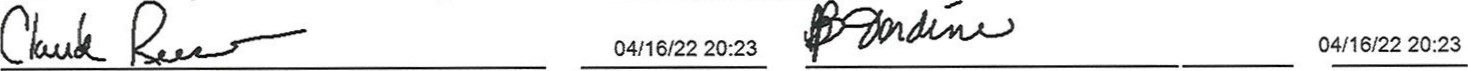
Angel Hall 04/16/2022 15362 DH116550 2021

Tax Preparer's Name Date Office Number Receipt Number Tax Year

N/A N/A



Primary Taxpayer's Signature Date Secondary Taxpayer's Signature Date X Audit Securty Guarantee has been explahed and l/we have declined to purchase.



Primary Taxpayer's Signature Date Secondary Taxpayer's Signature Date



Tax Preparer's Signature Date

F 10/1/21

JHFDAGGD192021 Date/Tirne

Page 2 of 2

08:22:01

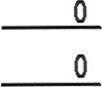
## Return Verification

|  |  |  |
| --- | --- | --- |
| Primary Taxpayer's Name | Primary Taxpayers SSN | Receipt Number |
| BEVERLY D JERDINE | xxx-xx-8928 | 2021 |

CLAUDE W REESE xxx-xx-6363 DH 116550

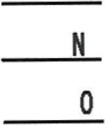
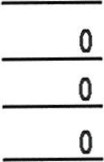
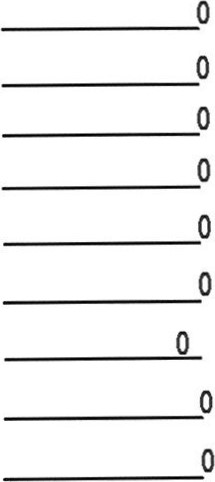
Secondary Taxpayer'S Name Secondary Taxpayers SSN Tax Year

Your tax retum was prepared with your help. Thank you for providing tax documents and other details that helped Jackson Hewitt prepare your tax return. Below we've captured the forms and schedules and the number of each that you provided. Review this information to ensure we've included every piece of information in your tax retum.

 Number of W-2(s) presented  Number of Social Security Benefits (SSA-1099)

Number of 1099-G(s) presented o Number of Railroad Retirement Benefits (RRB-1099)



 Number of 1099-1NT(s) presented 0 Schedule A Itemized Deductions

Number of 1099-DIV(s) presentedSchedule C Gross Receipts/SaIes

Number of 1099-K(s) presentedSchedule C Expenses

Number of 1099-NEC(s) presentedReservist Travel Expense

2 made

Number of 1099-R & RRB-1099 R(s) presentedEstimated federal tax payment(s)

1099R COVID-19 included in income over 3 years (YIN)Estimated state tax payment(s) made

Number of 1099-C(s) presented2019 Earned Income for EIC

Number of 1095-A(s) presented o Notice/Letter 1444-C/6475 EIP3 Amt Received

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Dependent Information |  |  |  |  |  |
| Dependent Name | Relationship | Date of Birth | SSN | Number of Dependents |  |

Number of 1098-T(s) presented  Notice/Letter 6419-Total Adv CTC Pymts Received

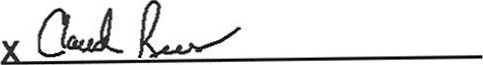
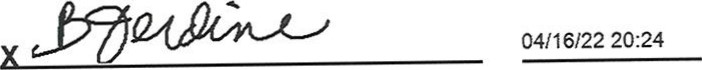
State/LocaI tax return preparation has been explained and Ilwe decline to complete the return(s) at this time.

State retum preparation declined for:

Local retum preparation declined for:

Please sign this form below. This helps us know that we included all the documents and forms provided by you. You are responsible to keep any records that support deductions and credits. Some of the information you shared verbally, and we want to be sure we got it right. If you see anything missing or incorrect, we'll stop and correct it now before you sign.

|  |  |  |
| --- | --- | --- |
| Primary Taxpayer's Signature  F 11/16/21 | Date | Secondary |

 04/16/22 20:24 

Taxpayer•s Signature Date

 Date/Time Printed: 04/16/2022 08:22:01 PM EDT

JHFD1326142011

c

Confirmation of Agreement to View and Sign Documents Electronically

|  |  |  |  |
| --- | --- | --- | --- |
|  | |  |  | | --- | --- | |  | 16550 | |

|  |  |
| --- | --- |
| Primary Taxpayer's Name | Receipt Number |
| BEVERLY D JERDINE | 2021 |

CLAUDE W REESE

Secondary Taxpayer's Name Tax Year

By signing below, you acknowledge that you have reviewed, agreed to, and applied your signature to the documents and consents listed below.

Consent to Use of Tax Retum Information

* Products, Progams, or Services

. Cortacts

* Tex't Messages

Consent to Disdost-re of Tax Retum Information

* Assisted Refund to Republic Bark & Trust Ca•npany
* American Express Serve Card toAmeican Express Travel Related Services Company, Inc., and Repthlic Bank & Trust Company
* Refer-a-Friend to NextBee Corporation
* Personalized credit and insurance services by tNrd-party companies to Jackson Hewitt Marketing Services, LLC
* Personalized financial products offered by tNrd-party companies to Jackson Hewitt Marketing Sen.'ices, LLC
* Consumer reports to Jackson Hewitt Marketing SeMces, LLC

Consent to Use Electroric Records and Signatures, Page 2

Taxpayer Infomation Fom, Page 2

Form 8879 - IRS required Wm to electroNcally file yourtax retum

Gereric State AR Disdosure

Republic Bank Fee Disclosure

Republic Assisted Reftnd Application, Page 5

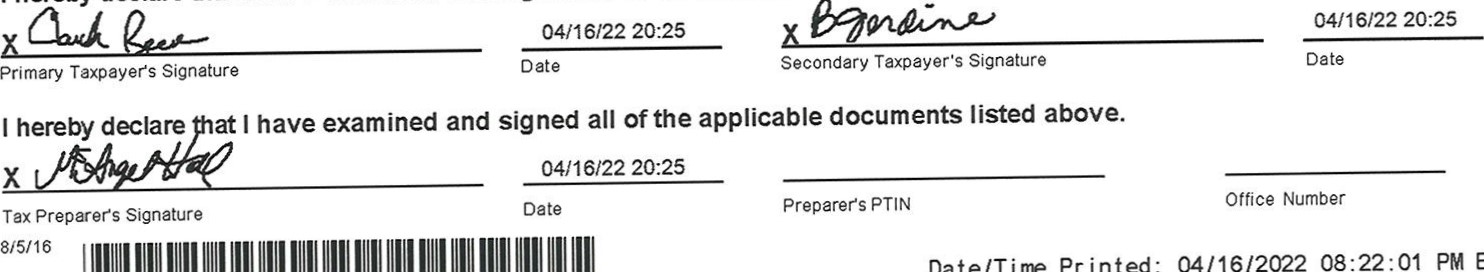
American Express Prepaid Card Application

Form 8453 - MicNgan's required form to e-File your state rettrn

Worry-free Guarartee Certificate, Page 2 Aucfit Security Guarantee Certificate, Page 2

Retum Verification

I hereby declare that I have examined and signed all of the documents listed above.



F

c

Jackson Hewitt

TAX SERVICE

Primary: REESE

Receipt: DHI 16550

eDocument storage allows you to access your tax preparation documents from the Internet in the privacy of your own home- NOTE: you will need to create a MyJH account in order to access your documents- 

To view or print your documents, please complete the following steps:

1. Go to wm.JacksonHewittcom.
2. Log into MyJH-
3. Click on Return Status-
4. Enter the information into the Express Authentication section using the following Document Package Number when prompted:

GK22-3QVU-ZNKE-2CZS

NOTE: You are also able to authenticate using the Standard Authentication section

1. Click Authenticate-
2. To download your documents, click on the Ellipse Button 

You will need Adobe Acrobat Reader to view and print your documents. If you do not have Acrobat Reader, click the "Get Adobe' Reader" button located at the bottom of the eDocuments page- The Document Package Number on this letter provides access to your Personally Identifiable Information (Pll)- To reduce the risk of identity theft, it is important that you protect the information on this letter as well as all your tax related documents.

If you need any assistance accessing your documents, please call us at 1-877-476-3353-

Sincerely,

Jackson Hewitt Tax Ser,'ice

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| DH116550  TAX SERVICE  Tax Return: CLAUDE W REESE & BEVERLY D JERDINE | | | | 04/16/2022 |
| Filing Status: YfarriedFiling Joint | |  | |
| Your Tax Pro: Angel Hall |  | We are Available Year-Round: | |  |
| Gratiot Avenue |  | Schoenherr Rd. | |  |
| Eastpointe, 48021-2857  (248) 406-6025  Your Filing Office: 15362  helped maximize your refund.  identified these credits and/or deductions for you:  Eamed Income Credit  Your Refunds  Federal Refund  Resident State Refund | $4,157.00  $458.00 | Sterling Heights, (248) 406-6025 | 48313  $414.00 |  |
| Your Products and Services |  | Your Jackon Hewitt Tax Prep Includes | | |
| Fed - Deluxe Package | $180.00 | Maximum Refund Guarantee & Lifetime Accuracy Guarantee | | |
| State Retum | $60.00 | IRS Audit Assistance | | |
| Assisted Refund Fees\* | $49.95 | Year-Round Service | | |
| Total Fees | $289.95 | Access and Enrollment into MyJH W-2 Download / Electronic Filing | | |
| Expected Payment Type: Refund |  | \*See Assisted Refund Disclosures for itemization of fees  (State refund included in Assisted Refund) | | |

# Jackson Hewitt

You have selected Assisted Refund. Payment is required upon completion of services, which is when your reüld has been disbursed to you or such later time that it appears that no tax refund will be received.

## Your Expected Net Refunds Disbursed on an American Express Serve@ Card $4,325.05

If you are expecting a federal and state refund, you may receive multiple disbursements. Your tax prep and any associated fees will be repaid prior to you receiving your federal and state refund, as applicable.

Thank You for doing business with Jackson Hewitt!



JHFD1110011

Jackson Hewitt'

TAX SERVICE

## Tax Benefits Comparison Summary

|  |  |  |  |
| --- | --- | --- | --- |
| Primary Taxpayer:  Secondar ' Tax a er: | CLAUDE W REESE  BEVERLY D JERDINE | Recei t Number: | DI-1 116550 |

Keep track of your tax information from one tax season to the next as your tax situation changes. As a prior year Jackson Hewitt customer, you will find last year's tax summary in the column immediately left of this years summary. Note how changes may have affected this year's refund/balance due.

Description: 2019 2020 2021

|  |  |  |  |
| --- | --- | --- | --- |
| Fifing status .  Number of dependents  Total income  Wages, salaries, tips, etc.  Business income.  Taxable IRA distribution . . . . . . . . .  Taxable pensions and annuities.  Taxable social security.  Rents, royalties, K-ls  Taxable unemployment Total adjustments. .  Total adjusted gross income .  Itemized or standard:  Itemized deductions .  Standard deductions. .  Method used .  Qualified business income deduction .  Taxable income.  Excess advance premium tax credit repayment. .  Total tax less nonrefundable credits .  Nonrefundable child/dependent care credit.  other  dependents  Nonrefundable child tax credit/credit  Other nonrefundable credits .  Self-employment tax .  Marginal tax rate  Total payments  Federal withholding  Estimated payments  Earned income credit  Refundable child/dependent care credit  Refundable child tax credit/AdditionaI child tax credit Net premium tax credit.  Federal refund/balance due |  | MFS | MFJ |
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|  | 14 72 | 24 660 |
|  | 14 72 | 15 118 |
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If you have questions on your Tax Benefits Comparison Summary, please call us at (248) 406-6025. For a glossary of terms and tips to help you monitor changes to your tax situation, please visit our website at www.iacksonhewitt.com.

1 1/10/21

 Date/Tinp Printed: 04/16/2022 PM EDT

JHFD1151011

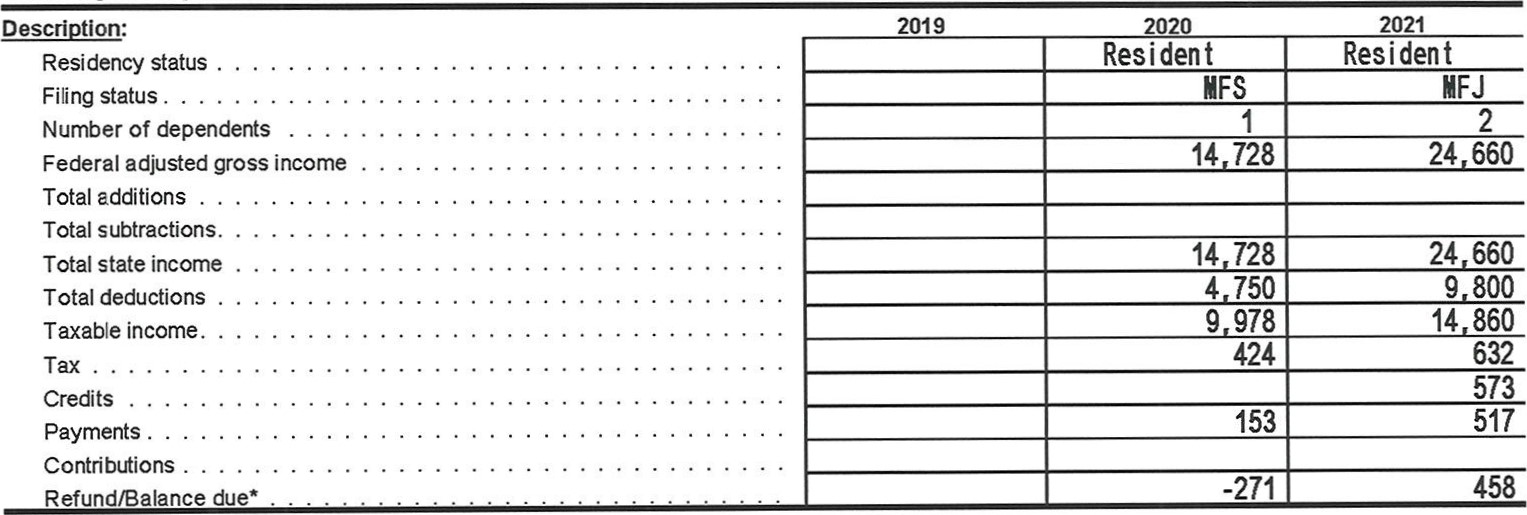
Jackson Hewitt

TAX SERVICE M i ch igan

## Tax Benefits Summary

|  |  |  |
| --- | --- | --- |
| Primary Taxpayer:  S use: | CLAUDE W REESE  BEVERLY D JERDINE | Recei t Number DHI 16550 |

The Tax Benefits Summary highlights key details used to calculate your refund/balance due each year Jackson Hewitt prepares your tax retum. This is a great way to see how your life changes affect your tax retum.



If you have questions on any portion of your Tax Benefits Summary, please call us at (248) 406-6025 . For a glossary of terms and tips to help you get the biggest refund you deserve, please visit our website at www.iacksonhewitt.com.

\*The refund or balance due shown is based on the total tax less payments and credits. The actual refund or balance due may differ if there are penalties and interest, contributions to authorized organizations or a credit of all or part of the refund towards next years tax.

F 6/29/21



JHST0106011

Jackson Hewitt'

TAX SERVICE Independently Owned and Operated

20914 Gratiot Avenue

Eastpointe, Ml 48021-2857

(248) 406-6025

April 16, 2022

Dear CLAUDE and BEVERLY,

Congratulations! Your 2021 income tax retum has been completed and filed electronically with the IRS.

Your 2021 federal tax retum included the following forms and schedules:

1. Form 1040-SR I TaxBenefits Comparison 1 Form 8867
2. Form W-2 2 Form 1099-R

You have chosen to receive your federal refund on the American Express Serve@ Card. As soon as your refund is processed and available from the IRS, it will be added onto your Serve@ Card. If you have any questions about using your Serve@ Card please call 1-855-431-6040. The timing of your refund is always controlled by the IRS and their processes of return review and verification. This can cause additional delays in the IRS timing for issuing your refund; delays could exceed 8 weeks.

You can track the status of your refund by using Where's My Refund on the IRS website. You will need the following information from your tax return:

* + Social Security Number or Individual Taxpayer Identification Number (Self Provided).
  + Filing Status (located on your receipt).
  + Exact refund amount (located on your receipt).

We hope you had an excellent filing experience and would appreciate your feedback Be on the lookout for a short email survey. We also appreciate Google reviews. Just find us on Google Maps and add your rating and renew.

Refer and earn SSS. We love introductions to new clients! Please refer your friends, family or social network to Jackson Hewitt and earn money when they complete their taxes with us. We have enclosed referral certificates to get you started. You will also receive a unique code that you can share digitally with your friends, family or social network. There's no limit to how much you can eam.

Your refund is $458 for your Michigan Resident return. Your state return has been electronically filed.

The following forms and schedules are part of your Michigan retum:

Michigan Forms List:

1 Form 1 Comparison Summary 1 Fom Nfl-1040CR 1 Schedule W

Attachment List:

Attach a copy of all W-2Gs and any 1099s with Michigan withholding.

Thanks so much for giving us a chance to work hard for you! Jackson Hewitt@ is available to help you year round. If you have questions, don't hesitate to call us at (248) 406-6025.

Sincerely,

Jackson Hewitt Tax Service

DH116550 c

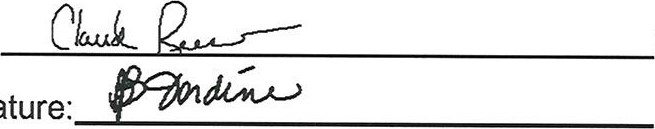
### CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

Subject to certain exceptions, the Internal Revenue Code ({7216) requires that we obtain your consent to the disclosure of information you provide Jackson Hewitt Inc. and its subsidiaries, parents, affiliates, and independently owned and operated third-party franchisees (collectively, "Jackson Hewitt") in connection with the preparation of your tax return ("tax return information").

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

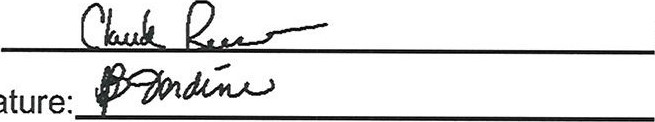
You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for five years. If you wish to limit the duration of your consent to one year from the date of signature, please send an email with the subject line "Disclosure" and the body of the message with, "I wish to limit the duration of my consent to one year" to Jackson Hewitt at privacy@jhnet.zendesk.com.

I authorize Jackson Hewitt to disclose to Republic Bank & Trust Company the tax return information necessary to apply for and to administer the Assisted Refund.

Taxpayer Signature:Date: 04/16/22 20:23

Joint Taxpayer Signature: Date: 04/16/22 20:23

I authorize Jackson Hewitt to disclose to American Express Travel Related Services Company, Inc., Interactive Communications International, Inc. and Republic Bank & Trust Company the tax return information necessary to apply for and to administer the Serve@ American Express@ Prepaid Debit Account.

Taxpayer Signature:Date: 04/16/22 20:23

Joint Taxpayer Signature: Date: 04/16/22 20:23

I authorize Jackson Hewitt to disclose to TruPoint Marketing, LLC, Tax Protection Plus, LLC and its subcontractors, Experian and Legal Club of America, the tax return information necessary to apply for and to administer the Worry-free Guarantee, the Audit Security Guarantee, Tax Identity Theft Protection Services and Cyber Identity Monitoring, as applicable. I understand that claims review and administration may require the disclosure of the entire tax return.

Taxpayer Signature: Date:



Joint Taxpayer Signature: Date:



I authorize Jackson Hewitt to disclose to Interactive Communications International, Inc and Walmart the tax return information necessary to apply for and to administer the Walmart eGift Card.

Taxpayer Signature:Date:



Joint Taxpayer Signature:Date:



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Consent to Disclosure of Tax Return Information

I authorize Jackson Hewitt to disclose to MetaBank@ N.A. and Republic Bank & Trust Company the tax return information necessary to apply for, administer, and disburse the Refund Advance loan(s).

Taxpayer Signature:Date:



Joint Taxpayer Signature:Date:



I authorize Jackson Hewitt to disclose to Jackson Hewitt Marketing Services, LLC ("JHMS") the tax return information necessary for the purpose of providing me personalized offers of credit, savings, insurance, financial planning, debt management, and other financial products offered in partnership with, by, or on behalf of, third parties, and to advise me of such offers by phone, mail, internet advertising, television, or at the email address provided by me, I authorize JHMS to further share that information with third party lenders, credit providers, research institutions or insurance companies, as necessary for the purpose of providing personalized offers. I authorize Jackson Hewitt and JHMS to obtain consumer report information about me from consumer reporting agencies for the purpose of evaluating ability to offer credit in the future. This may also include the disclosure of tax return information that is necessary to engage in data analysis, research, and analytics to provide improved personalized offers in the future. I understand that I can review the Jackson Hewitt Privacy Policy, provided to me today and available online, for more information.

Taxpayer Signature: Date: 04/16/22 20:23

Joint Taxpayer Signature:Date: 04/16/22 20:23

If you believe your tax return information has been disclosed or used improperly in a manner un- authorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA)

by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

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### CONSENT TO USE OF TAX RETURN INFORMATION

Subject to certain exceptions, the Internal Revenue Code ("S 7216") requires that we obtain your consent to the use of information you provide Jackson Hewitt Inc. and its subsidiaries, parents, affiliates, and independently owned and operated third-party franchisees (collectively, "Jackson Hewitt") in connection with the preparation of your tax remrn ("tax return information").

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for five years. If you wish to limit the duration of your consent to one year from the date of signature, please send an email with the subject line "Consent to Use" and the body of the message with, "I wish to limit the duration ofmy consent to one year" to Jackson Hewitt at privacy@jhnet.zendesk.com.

I authorize Jackson Hewitt to use the tax return information necessary to determine whether any products, programs or services may be relevant, available and/or of interest to me during or after my tax interview, and to advise me of such offers by phone, mail, internet advertising, television, or at the email address provided by me. This includes Jackson Hewitt engaging in activities or providing services, such as:

 Any loan products in the Refund Advance Product Family

* Assisted Refund
* Worry-free Guarantee(s)
* Walmart eGift Card
* Serve@ American Express@ Prepaid Debit Account  Refer-A-Friend@
* Providing reviews of our service(s)

 Marketing of additional third-party products, services, promotions or offers

I understand that Jackson Hewitt may use my tax return information to optimize marketing efforts, to support the products and services that I have requested, and to provide me with relevant information on products and services that may benefit me.

Taxpayer Signature:Date: 04/16/22 20:23

Joint Taxpayer Signature: Date: 04/16/22 20:23

If you believe your tax return information has been disclosed or used improperly in a manner un-authorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

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CONSENT TO MARKETING CONTACT VIA TELEPHONE 116550

By signing this consent I authorize Jackson Hewitt or someone on their behalf to deliver or cause to be delivered advertising and telemarketing calls and text messages using an automatic telephone dialing system or an artificial or prerecorded voice to my phone number (313) 753-3576 . I agree that I am not required to sign or agree to enter into this agreement as a condition of purchasing any property, goods or services. If you would like to revoke your consent to be contacted by Jackson Hewitt or our service providers to receive advertising and telemarketing calls and text messages at the telephone number provided, please email priyacy@jhnet.zendesk.com or call us at 1-800-234-1040.

Taxpayer Signature:Date: 04/16/22 20:23



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Joint Taxpayer Signature:Date: 04/16/22 20:23

Date/Time Printed: 04/16/2022 08:22:01 PM EDT

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