



# Customer Data Sheet

This form is to assist in the preparation of your Income Tax Return.

Please file the following returns:

Federal  State  City

Tax Year: \_\_\_\_\_

Receipt #: \_\_\_\_\_

Preparer ID: \_\_\_\_\_

<input type="checkbox"/> Check If Someone can claim you as a dependent		<input type="checkbox"/> Check If Someone can claim you as a dependent	
<b>Primary Filer's Information</b>		<b>Spouse Information (if applicable)</b>	
First Name:		First Name:	
Last Name:		Last Name:	
SSN:	DOB:	SSN:	DOB:
Occupation:	ID #:	Occupation:	ID #:
Address:		Address:	
City:	State:	Zip:	
Ph(eve):	Ph(day):	Ph(eve):	Ph(day):
Email:		Email:	
<b>Dependent's Information (Must be completely filled out)</b>			
<b>Dependent's Name</b> (First, Middle and Last Name)	<b>Date of Birth</b>	<b>Social Security Number</b>	<b>Relationship</b>
<b># Months lived with You during tax year</b>			
<input type="checkbox"/> My child(ren) did not live with me/us but are claimed as my/our dependent under a pre-1985 agreement		<input type="checkbox"/> I have received advanced Earned Income Credit	
<b>Source(s) of Income (Check the income items which pertain to you and write in the number of forms)</b>			
<input type="checkbox"/> Wages or Salary (W-2s) # of W-2s: _____		<input type="checkbox"/> Self-Employment/Business Income (must fill out Sch. C Form)	
<input type="checkbox"/> Pension / Social Security	<input type="checkbox"/> Rental Income	<input type="checkbox"/> Interest Income	<input type="checkbox"/> Dividends / Sale of Stocks
<input type="checkbox"/> Alimony Received	<input type="checkbox"/> DHS Income	<input type="checkbox"/> Unemployment	<input type="checkbox"/> Lottery/Gambling (W-2G)
<input type="checkbox"/> Other Income (please specify): _____		<input type="checkbox"/> 1099-Misc # of 1099-Misc: _____	
<b>Child Care Information</b>			
Provider's Name:		Provider's SSN/EIN:	
Address:		City:	State: ZIP:
Child 1 Name:		Child 2 Name:	
Amount paid to Provider for Child 1: \$ _____		Amount paid to Provider for Child 2: \$ _____	
<b>Choose your refund option (only pick one)</b>			
<input checked="" type="checkbox"/> <del>RAL—Refund Anticipation Loan (typically 24–48 hours)</del>		<input type="checkbox"/> ETR—Electronic Filing (Fees must be paid up front)	
<input type="checkbox"/> AR—Accelerated Refund (typically 11-21 days)		<input type="checkbox"/> PAP—Paper Return (Fees must be paid up front)	

I/We confirm that all the information given in this form and at any part of the interview is correct and true to the best of my knowledge. I/We am/are using Jackson Hewitt Tax Service™ as the tax preparer for my Federal, State, or local return based on the information provided in this form and any part of the interview. Jackson Hewitt Tax Service™ may transmit my return electronically to the IRS and/or State. When the IRS and/or State accepts your return, Jackson Hewitt Tax Service™ no longer has control of it. If I/We elect to apply for a RAL or AR, I/We understand that there following are not in the control of Jackson Hewitt Tax Service:

- The bank may deny a request for a RAL on all or part of my refund. If this happens, I/We will receive any balance when the IRS deposits my refund into the bank or contacts me/us directly.
- The EITC (Earn Income Tax Credit) portion of my tax refund may cause the IRS to delay depositing my refund into the bank.
- I understand that Jackson Hewitt Tax Service™ cannot issue a check to me until notified by the bank that my refund has been received from the IRS.\*
- I understand that if I have a delinquent loan from another bank, I may not receive the full amount of the requested loan.
- I have been given a copy of the bank's application, and acknowledge that I/We will receive Notice of Privacy Act along with my tax papers.

In the event that preparation of my/our tax return is started, Jackson Hewitt Tax Service™ may charge a Cancellation fee of a minimum of \$35, with or without submission to the IRS/State. This fee must be paid prior to release of any Tax Papers. No refunds on tax preparation fees will be given.

**CLIENT SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**SPOUSE SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

\* If you do not receive all or your refund in the time expected, you should call the IRS at 1-800-829-1040. Due to the Privacy Act, only you can request information about the status of your tax return