

**Jackson Hewitt<sup>®</sup>**  
**TAX SERVICE**

**WORRY-FREE GUARANTEE  
GUIDEBOOK**

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**I. Overview**

When clients pay for tax preparation at Jackson Hewitt®, they will automatically receive the following for free:

- **Lifetime Accuracy Guarantee** – If any local Jackson Hewitt® office makes an error preparing a tax return, they will pay any penalties and interest charges.
- **IRS Audit Assistance** – In the event of an audit notice from the IRS, the local Jackson Hewitt® office will explain to the IRS how the tax return was prepared. Please note that Jackson Hewitt cannot act as your legal counsel or financial advisor.

Terms and Conditions for the Lifetime Accuracy Guarantee and IRS Audit Assistance are included in the “Jackson Hewitt Products and Services” brochure.

For an additional fee, clients can choose to purchase the Worry-free Guarantee, which provides an additional level of coverage above and beyond the Lifetime Accuracy Guarantee. When a client purchases the Worry-free Guarantee, they may receive reimbursement for any additional tax liability or reduction in refund if a Jackson Hewitt tax preparer makes an error preparing the client’s income tax return. There are three options for the Worry-free Guarantee:

- **Worry-free Guarantee Basic** – reimbursement of up to \$1,500
- **Worry-free Guarantee Deluxe** – reimbursement of up to \$5,000 plus Tax Identity Theft Protection
- **Worry-free Guarantee Platinum** – reimbursement of up to \$5,000 plus Audit Security, Tax Identity Theft Protection and Cyber Identity Monitoring

Coverage Benefits	Worry-free Guarantee Basic	Worry-free Guarantee Deluxe	Worry-free Guarantee Platinum
Reimbursement Amount	Up to \$1,500	Up to \$5,000	Up to \$5,000
Identity Theft Services	n/a	Tax Identity Theft Protection	Tax Identity Theft Protection & Cyber Identity Monitoring
IRS Audit Services	Free IRS AUDIT ASSISTANCE	Free IRS AUDIT ASSISTANCE	Free IRS AUDIT ASSISTANCE & Audit Security Guarantee

**Worry-free Guarantee:** If a Jackson Hewitt Tax Preparer makes an error in the preparation of a client’s Covered Tax Return (as defined below), they: (1) receive a tax refund from a taxing authority smaller than the refund amount set forth on their tax return, and/or (2) are required by a taxing authority to pay a tax liability in excess of the amount set forth on their tax return, then Jackson Hewitt Inc. will reimburse them for the net amount of such refund shortfall and/or additional tax liability as the case may be, up to a cumulative total of \$1,500 for Worry-free Guarantee Basic or \$5,000 for Worry-free Guarantee Deluxe and Worry-free Guarantee Platinum. Coverage is effective

through, and will automatically terminate on, the third anniversary of the date of the filing deadline for the Covered Tax Return, not including extensions. Worry-free Guarantee will become null and void if payment is not received within 30 days of the date on the Worry-free Guarantee Certificate. "Covered Tax Returns" means your Federal (excluding non-resident), state, and local tax returns for the tax year stated on the Worry-free Guarantee Certificate that are prepared by a Jackson Hewitt Tax Service tax preparer and are dated the same date of the Certificate. Reimbursement under Worry-free Guarantee does not include penalties and interest. Coverage exclusions apply. The Certificate and the benefits under Worry-free Guarantee are not transferable and are subject to additional terms and conditions. See the Worry-free Guarantee Certificate (section V1 of this document) for full terms and conditions, including coverage exclusions and claims process and requirements.

**Audit Security Guarantee:** Offered as part of Worry-free Guarantee Platinum. If the Internal Revenue Service (IRS) or a state or federal taxing authority (a "Tax Authority") questions the accuracy of a Covered Tax Return (defined below), Jackson Hewitt Inc. and/or its affiliate or service provider ("Jackson Hewitt") will provide clients with the following services (collectively, the "Services"): (i) evaluation of all related Tax Authority correspondence; (ii) explanation of claim requirements and available options; (iii) document review, consultation and organization; (iv) drafting of letters and other necessary correspondence with the Tax Authority as appropriate; (v) assistance with telephone communication with the Tax Authority agent for explanations and discussions during the audit process; (vi) assistance with all Tax Authority forms including schedules A, C, D and E unless an exclusion applies; (vii) assistance with denied credits, including: Earned Income Credit, Child and Dependent care Credit, Education Credits, Child Tax Credit, Additional Child Tax Credit, Adoption Credit, Credit for the Elderly or Disabled, Savers Credit; (viii) assistance with rejected W-7 applications; (x) assistance with state audits/inquiries. "Covered Tax Return" means their Federal (excluding non-resident) and state returns for the tax year stated below that are prepared by a Jackson Hewitt Tax Service tax preparer and are dated the same date of this Certificate, as filed with the applicable Tax Authority and for which no exclusion applies. Coverage is effective through, and will automatically terminate on, the third anniversary of the date of the filing deadline for the Covered Tax Return, not including extensions. Audit Security Guarantee will become null and void if payment for Worry-Free Guarantee Platinum is not received within 30 days of the date on the Audit Security Guarantee Certificate. The Certificate and the benefits under Audit Security Guarantee are not transferable and are subject to additional terms and conditions. See the Audit Security Guarantee Certificate (section V1 of this document) for full terms and conditions, including exclusions and claims process and requirements.

**Tax Identity Theft Protection:** Services will begin from the date payment for Worry-free Guarantee Deluxe or Worry-free Guarantee Platinum is received, and will automatically terminate on the first anniversary of the current year April filing deadline (typically April 15) not including extensions. Services are only available to (a) the primary taxpayer with a valid Social Security number, (b) the primary taxpayer with a valid Social Security number and the secondary taxpayer with a valid Social Security number, if the primary taxpayer and the secondary taxpayer file their federal tax return as "married filing jointly". Services are not transferable and are subject to other terms and conditions.