

## GETTING STARTED

If you have read the letter above from Heather and you are eligible to continue, let's get started.

You will need to fill out ALL of the following and either mail, fax or e-mail the information back to us: FAX#: 304-232-7984 E-Mail: [ellenj@jhltax.com](mailto:ellenj@jhltax.com) Address located below.

- **Easy Workbook** [This workbook is for those who have W2 wages, interest income from banks, dividend income, sale of stock (this **MUST** be accompanied by ALL broker statements with the purchase date and purchase price listed on your statements)] \*\*\*If you are a **NEW** client you must fill out the Advanced Workbook Personal Information Sheet in the Advanced Workbook section.\*\*\*
  - Personal Information Sheet
  - Check list [please double check it to make sure you aren't missing anything]
  - Payment Page
  - Deduction Sheet
  - Power of Attorney (optional) If you have any questions regarding the Power of Attorney, please don't hesitate to call or e-mail me. Instructions are directly following the Advanced Workbook requirements.
  
- **Advanced Workbook** \*\*\***All NEW** Clients must fill out the Personal Information Sheet located in this section. If you don't have any of the other types of income listed in this section, use the information forms listed in the Easy Workbook section\*\*\* ( This workbook is for those who have all of the above types of income as well as self employment, K1 income, rental income or any other types of income not listed.)
  - Personal Information Sheet
  - Check list (please double check it to make sure you aren't missing anything)
  - Payment Page
  - Deduction Sheet
  - Power of Attorney (optional)
  - Self Employment (3 pages to this questionnaire)
  - Rental Property (2 pages to this questionnaire)
  - Sale of Property (See Personal Information Sheet for details needed)
  - First Time Homebuyer Credit (2 pages Information Sheet and questionnaire)
  - Repayment of the First-Time Homebuyer Credit (4 pages Information sheet and questionnaire)

Jackson Hewitt Tax Service  
1213 Market Street  
Wheeling, WV 26003  
Attn: Ellen Jackson Blake  
304-232-7975  
[ellenj@jhltax.com](mailto:ellenj@jhltax.com)  
fax 304-232-7984

**2010 Personal Information** Please fill this form out in it's entirety.

- Attach additional sheets as necessary to explain any particular circumstances or elaborate on anything we might need to know.
- When you are finished, email or mail the form to the address above.

I. Personal Information		
	A. Taxpayer (If you are married, this should be the name you want listed first on your tax return. List you spouse's name and SS # as well)	***ATTENTION ALL SKATERS***Please include a copy of your 2009-2010 and 2010-2011 employee contracts. **If you worked for any other employer that you had to sign a contract, please include ALL contracts needed to cover the entire time frame in which you worked for each company.**
Full Legal Name		
Social Security Number		
Date of Birth (M/D/Y)		
Occupation ***A MUST***		
Can your parents claim you on their 2010 tax return? (circle one)	yes                  no	
Which Tour(s) were you on? Please five the name of the tour(s) and the number(s)(example: D-30 Let's Celebrate.)		**PLEASE INCLUDE ALL TOUR SCHEDULES. IF YOU WERE NOT ON THE ENTIRE TOUR, LIST YOUR START AND END DATE.**
Citizenship (If not US, please give country of citizenship and also state whether you are a US green card or visa holder.)		
Address to put on your tax return (where the IRS would contact you if necessary)		**Make sure your SS# matches what is on your W2's. If it doesn't, you must contact your employer immediately with the correct information.**
If you are not a US Citizen, please add your foreign address here.		

**Additional Contact Information (PLEASE MAKE SURE YOU LEAVE CONTACT INFO.)**

<b>Email:</b>	
<b>Cell/Mobile Phone:</b>	

**II. Filing Details**

A. Refund: If you expect to receive a refund this year, how would you like to receive it? ("X" one)	Paper check (mailed to you within 6-8 weeks)	
<b>**ABSOLUTELY NO COD'S THIS YEAR**</b> If you have a prior year debt, it WILL be added to your balance due. See PAYMENT PAGE for more info.  If you are paying by credit/debt card, you MUST include a voided check in order to take advantage of the direct deposit option. NO ACCEPTIONS!!!	***ALL returns must be PAID IN FULL before submitting them to the IRS***  **If you forget to include your voided check, you can email or fax it to me. Email: ellenj@jhltax.com Fax #: 304-232-7984.	Apply to 2010 estimated tax payments.
	Direct deposit (deposited to your account within 2 weeks) <i>If you select direct deposit, please submit a voided check. (Must be a US bank.)</i>	Bank Name Account Number Routing Number Is this a checking or a savings acct?

**\*\*\*REMINDER\*\*\***

Please don't forget to include ALL financial documents you used to support the information you have given. Include ALL receipts for any deductions you are taking on your tax return. I will copy all original receipts and documents and return them to you upon completion of your tax return. If you do not include your receipts, I WILL NOT take use any deductions listed on your expense sheet.