

Freedom Tax Service Plus – Due Diligence Intake Sheet – 2019 Tax Year

Name:		Name:	
Email:		Email:	
Cell:		Cell:	
Other Ph:		Other Ph:	
Street:		City:	State: Zip:
Occupation:		Occupation:	

Marital Status – Check One and Fill in Dates as Required

Single?	Married?	Date of Marriage:
Divorced?	Date of Divorce:	
Separated?	Date of Separation:	
Address of Separated Spouse:		

Related children (thru blood, marriage, adoption, foster) in your home in 2019

(use another sheet if more than 4)

Child's Name	Mom's Name	Are you listed on Birth Cert?	# Months lived with you in 2019	Dad's Name	Is Dad listed on Birth Cert?	# Months lived with you in 2019

If one or both of child's parents are not in the home, explain:

Why aren't they claiming child?

Other Household Members

Name	Relationship	# Months in Home in 2019

Other Information

How do you handle daycare if needed?

Are lease/mortgage and utilities in your name? Explain if no.

Describe assistance, if any, you received last year

Child support monthly: \$	Food stamps monthly: \$	WIC? Y/N
Subsidized daycare? How much do you pay per week?		\$
Subsidized housing? How much do you pay per month?		\$
Subsidized utilities? How much do you pay per month?		\$
Cash assistance? How much did you receive per month?		\$

By signing below I hereby certify, under penalties of perjury, that the information above is true and accurate to the best of my knowledge.

Signature: _____ Date: _____

If you're a new client, who referred you?