

Freedom Tax Service Plus – Due Diligence Intake Sheet – 2023 Tax Year

Name:				Spouse:			
Street:			Apt:	City:	State:	Zip:	
Phones:				Phones:			
Email:				Email:			
Occupation:		DOB:		Occupation:		DOB:	

Marital Status – Check One and Fill in Dates as Required

Single	Widow/Widower	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 2023

(list on reverse if more than 4)

Child's Name	Date of Birth	Mom's Name	Are you listed on Birth Cert? Y/N	# Months lived with you in 2023	Dad's Name	Is Dad listed on Birth Cert? Y/N	# Months lived with you in 2023

How do you handle daycare if needed? _____

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 2023

Insurance Information

Healthcare Marketplace Insurance (Obamacare)? Y/N	If Yes, need 1095-A Form!!
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Other Income

Did you receive any:	Interest or Dividend Income? Y/N	Unemployment? Y/N
Social Security Income? Y/N	Retirement or IRA Distributions? Y/N	
Proceeds From Stock Sales? Y/N	Virtual Currency Transactions? Y/N	

Social Assistance How much did you receive in 2023 from:

Child support monthly: \$	Food stamps monthly: \$	WIC? Y/N
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Any energy efficiency home improvements or buy an electric vehicle? See back

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?☺ _____

POSSIBLE TAX CREDITS FOR FOLLOWING HOME IMPROVEMENTS
(YOU WILL NEED TO PROVIDE COST AND DATE OF IMPROVEMENTS)
(CHECK ALL THAT APPLY)

- Solar (electricity)
- Fuel Cells
- Wind Turbine
- Battery Storage
- Heat Pumps
- Heat Pump
- Heat Pump Water Heater
- Biomass Stove
- Geothermal heat pumps
- Solar (water heating)
- Efficient air conditioners
- Efficient heating equipment
- Efficient water heating equipment
- Electric panel or circuit upgrades for new electric equipment
- Insulation materials
- Windows, including skylights
- Home electric vehicle chargers

ELECTRIC VEHICLE

- Date of Purchase _____
- Make/Model _____
- Purchase Price _____
- New/Used...If used, purchase price: _____

VIN Needed