

# Freedom Tax Service Plus – Due Diligence Intake Sheet – 2020 Tax Year

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

### 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 2020

(see 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 2020	Dad's Name	Is Dad listed on Birth Cert? Y/N	# Months lived with you in 2020

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 2020

### Other Information

Did you get health insurance thru: Employer? Y/N \_\_\_\_\_ Private Plan? Y/N \_\_\_\_\_

Healthcare Marketplace (Obamacare)? Y/N \_\_\_\_\_ If Yes, need 1095-A Form! \_\_\_\_\_

How much did you receive in stimulus payments in 2020? \$ \_\_\_\_\_

### 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 Security Sales? Y/N \_\_\_\_\_ Virtual Currency Transactions? Y/N \_\_\_\_\_

### Social Assistance

How much did you receive in 2020 from:

Child support monthly: \$ \_\_\_\_\_ Food stamps monthly: \$ \_\_\_\_\_ WIC? Y/N \_\_\_\_\_

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?☺ \_\_\_\_\_

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