

Freedom Tax Service Plus – Due Diligence Intake Sheet – 2021 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	<input type="checkbox"/>	Widow/Widower	<input type="checkbox"/>	Married	<input type="checkbox"/>	Date of Marriage:					
Divorced	<input type="checkbox"/>	Date of Divorce:			Separated	<input type="checkbox"/>	Date of Separation:				
Address of Separated Spouse:											

Related children (thru blood, marriage, adoption, foster) in your home in 2021

(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 2021	Dad's Name	Is Dad listed on Birth Cert? Y/N	# Months lived with you in 2021

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 2021

Other Information

In 2021 how much did you receive in:	\$
Advanced Child Tax Credit Payments:	
Stimulus Payments:	\$
Healthcare Marketplace Insurance (Obamacare)? Y/N	If Yes, need 1095-A Form!!

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 2021 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?☺