

## Freedom Tax Service Plus – Due Diligence Intake Sheet

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

### 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 (thru blood or marriage) children in your home more than 6 months in 2017

(use another sheet if more than 4)

Child's Name	Mom's Name	listed on Birth Cert?	# Months lived w/2017	Dad's Name	listed on Birth Cert?	# Months lived w/2017

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

Why aren't they claiming child?	
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### Other Household Members

Name	Relationship	# Months in Home in 2017

### 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 <u>you</u> pay per week?		\$		
Subsidized housing? How much do <u>you</u> pay per month?		\$		
Subsidized utilities? How much do <u>you</u> pay per month?		\$		
Cash assistance? How much did <u>you</u> 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: \_\_\_\_\_