

**SET FREE TAX & PROFESSIONAL SERVICES
CLIENT INTAKE SHEET**

**COPIES OF ID/DL, SOCIAL SECURITY CARD, BIRTH CERTIFICATE, AND SHOT/SCHOOL
VERIFICATION FORM ARE REQUIRED FOR FILING EARNED INCOME CREDIT-ANY MISSING DOCS
REQUIRE A NOTARIZED STATEMENT
NO EXCEPTIONS**

Primary Name _____ SSN _____

Birth Date _____ Occupation _____

Email Address _____ Phone _____

Address _____ Unit _____ City, State, Zip _____

Spouse Name _____ SSN _____

Birth Date _____ Occupation _____

Email Address _____ Phone _____

Address _____ Unit _____ City, State, Zip _____

Are you a dependent of another? Yes No Are you active duty Military? Yes No

Did you attend college last Year? Yes No If yes, have you already claimed the American Opportunity
Credit? _____ Are you self employed? Yes No

Do you have Covered California Health Insurance? Yes No If Yes, please attached your tax form
1095-A If no, please attach 1095-B or C as mandated by the IRS to file your taxes.

If you do not have it, your taxes may be delayed by the IRS and penalties may be assessed if you do
not meet EXCLUSION CRITERIAS

DEPENDENTS must qualify under IRS regulations

First Name	Last Name	SSN	Relationship	DOB	Months in Home

What school do your children attend? _____

Do you pay child care Expenses? Yes No Are any of your dependents disabled? Yes No

Attach proof of supporting information in order to claim it on your taxes per IRS Regulations

Child Care Provider Information (Note: This information is required for each provider)

1. SSN/EIN _____ Provider's Name _____
Address _____ City, State, Zip _____
Annual Amount Paid \$ _____ Providers Phone Number _____
2. SSN/EIN _____ Provider's Name _____
Address _____ City, State, Zip _____
Annual Amount Paid \$ _____ Providers Phone Number _____

Do you have a child in college? Yes No If so, what are the annual expenses \$ _____

Do you have any delinquent Student Loan Debt? Yes No

Do you have any owed taxes? Yes No

Do you have any past due child support or debts? Yes No

PAYMENT OPTIONS

PAY UPFRONT FEE TODAY \$ _____ IRS will take up to 21 days to issue check or deposit electronic funds. No fees will be debited from your refund amount.

REFUND BANK PRODUCT OPTIONS (PAY LATER-FEES TAKEN OUT OF TAX REFUND CHECK) average 10-14 day REFUND TRANSFER can take up to 21 days

- CHECK OR DEBIT CARD TO PICK UP IN THE OFFICE or EXPRESS MAIL
- DIRECT DEPOSIT BANK NAME _____

Routing # _____ Account # _____

