Form **13614-C** (October 2022)	Department of the Treasury - Internal Revenue Service **Intake/Interview & Quality Review Sheet**	OMB Number 1545-1964

You will need:
- **Tax Information such as Forms W-2, 1099, 1098, 1095.**
- **Social security cards or ITIN letters for all persons on your tax return.**
- **Picture ID (such as valid driver's license) for you and your spouse.**

- **Please complete pages 1-4 of this form.**
- **You are responsible for the information on your return. Please provide complete and accurate information.**
- **If you have questions, please ask the IRS-certified volunteer preparer.**

Volunteers are trained to provide high quality service and uphold the highest ethical standards.
To report unethical behavior to the IRS, email us at wi.voltax@irs.gov

Part I – Your Personal Information (If you are filing a joint return, enter your names in the same order as last year's return)

1. Your first name	M.I.	Last name	Best contact number	Are you a U.S. citizen? ☐ Yes ☐ No
2. Your spouse's first name	M.I.	Last name	Best contact number	Is your spouse a U.S. citizen? ☐ Yes ☐ No

3. Mailing address	Apt #	City	State	ZIP code

4. Your Date of Birth	5. Your job title	6. Last year, were you: a. Full-time student ☐ Yes ☐ No b. Totally and permanently disabled ☐ Yes ☐ No c. Legally blind ☐ Yes ☐ No
7. Your spouse's Date of Birth	8. Your spouse's job title	9. Last year, was your spouse: a. Full-time student ☐ Yes ☐ No b. Totally and permanently disabled ☐ Yes ☐ No c. Legally blind ☐ Yes ☐ No

10. Can anyone claim you or your spouse as a dependent? ☐ Yes ☐ No ☐ Unsure

11. Have you, your spouse, or dependents been a victim of tax related identity theft or been issued an Identity Protection PIN? ☐ Yes ☐ No

12. Provide an email address (optional) (this email address will not be used for contacts from the Internal Revenue Service)

Part II – Marital Status and Household Information

1. As of December 31, 2022, what was your marital status?

☐ Never Married

☐ Married (This includes registered domestic partnerships, civil unions, or other formal relationships under state law)
- a. If Yes, Did you get married in 2022? ☐ Yes ☐ No
- b. Did you live with your spouse during any part of the last six months of 2022? ☐ Yes ☐ No

☐ Divorced Date of final decree ____________

☐ Legally Separated Date of separate maintenance decree ____________

☐ Widowed Year of spouse's death ____________

2. List the names below of:
- **everyone** who lived with you last year (other than your spouse)
- **anyone** you supported but did not live with you last year

If additional space is needed check here ☐ and list on page 3

Name (first, last) Do not enter your name or spouse's name below (a)	Date of Birth (mm/dd/yy) (b)	Relationship to you (for example: son, daughter, parent, none, etc) (c)	Number of months lived in your home last year (d)	US Citizen (yes/no) (e)	Resident of US, Canada, or Mexico last year (yes/no) (f)	Single or Married as of 12/31/22 (S/M) (g)	Full-time Student last year (yes/no) (h)	Totally and Permanently Disabled (yes/no) (i)	**To be completed by a Certified Volunteer Preparer** Is this person a qualifying child/relative of any other person? (yes/no)	Did this person provide more than 50% of his/her own support? (yes,no,n/a)	Did this person have less than $4,400 of income? (yes,no,n/a)	Did the taxpayer(s) provide more than 50% of support for this person? (yes/no/n/a)	Did the taxpayer(s) pay more than half the cost of maintaining a home for this person? (yes/no)

Check appropriate box for each question in each section

Yes	No	Unsure	Part III – Income – Last Year, Did You (or Your Spouse) Receive
☐	☐	☐	1. (B) Wages or Salary? (Form W-2) **If yes, how many jobs did you have last year?** ______
☐	☐	☐	2. (A) Tip Income?
☐	☐	☐	3. (B) Scholarships? (Forms W-2, 1098-T)
☐	☐	☐	4. (B) Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
☐	☐	☐	5. (B) Refund of state/local income taxes? (Form 1099-G)
☐	☐	☐	6. (B) Alimony income or separate maintenance payments?
☐	☐	☐	7. (A) Self-Employment income? (Forms 1099-MISC, 1099-NEC, 1099-K, cash, digital assets, or other property or services)
☐	☐	☐	8. (A) Cash/check/digital assets, or other property or services for any work performed not reported on Forms W-2 or 1099?
☐	☐	☐	9. (A) Income (or loss) from the sale or exchange of stocks, bonds, digital assets or real estate? (including your home) (Forms 1099-S, 1099-B)
☐	☐	☐	10. (B) Disability income? (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2)
☐	☐	☐	11. (A) Retirement income or payments from pensions, annuities, and or IRA? (Form 1099-R)
☐	☐	☐	12. (B) Unemployment Compensation? (Form 1099-G)
☐	☐	☐	13. (B) Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
☐	☐	☐	14. (M) Income (or loss) from rental property?
☐	☐	☐	15. (B) Other income? (gambling, lottery, prizes, awards, jury duty, digital assets, Sch K-1, royalties, foreign income, etc.)

Yes	No	Unsure	Part IV – Expenses – Last Year, Did You (or Your Spouse) Pay
☐	☐	☐	1. (B) Alimony or separate maintenance payments? If yes, do you have the recipient's SSN? ☐ Yes ☐ No
☐	☐	☐	2. Contributions or repayments to a retirement account? ☐ IRA (A) ☐ Roth IRA (B) ☐ 401K (B) ☐ Other
☐	☐	☐	3. (B) College or post secondary educational expenses for yourself, spouse or dependents? (Form 1098-T)
☐	☐	☐	4. Any of the following? ☐ (A) Medical & Dental (including insurance premiums) ☐ (A) Mortgage Interest (Form 1098) ☐ (A) Taxes (State, Real Estate, Personal Property, Sales) ☐ (B) Charitable Contributions
☐	☐	☐	5. (B) Child or dependent care expenses such as daycare?
☐	☐	☐	6. (B) For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?
☐	☐	☐	7. (A) Expenses related to self-employment income or any other income you received?
☐	☐	☐	8. (B) Student loan interest? (Form 1098-E)

Yes	No	Unsure	Part V – Life Events – Last Year, Did You (or Your Spouse)
☐	☐	☐	1. (A) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)
☐	☐	☐	2. (A) Have credit card, student loan or mortgage debt cancelled/forgiven by a lender or have a home foreclosure? (Forms 1099-C, 1099-A)
☐	☐	☐	3. (A) Adopt a child?
☐	☐	☐	4. (B) Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in a prior year? If yes, for which tax year? ______
☐	☐	☐	5. (A) Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)
☐	☐	☐	6. (A) Receive the First Time Homebuyers Credit in 2008?
☐	☐	☐	7. (B) Make estimated tax payments or apply last year's refund to this year's tax? If so how much? ______
☐	☐	☐	8. (A) File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D?
☐	☐	☐	9. (A) Have health coverage through the Marketplace (Exchange)? [Provide Form 1095-A]

Additional Information and Questions Related to the Preparation of Your Return

1. Would you like to receive written communications from the IRS in a language other than English? ☐ Yes ☐ No If yes, which language? ____________
2. Presidential Election Campaign Fund (If you check a box, your tax or refund will not change)
   Check here if you, or your spouse if filing jointly, want $3 to go to this fund ☐ You ☐ Spouse
3. If you are due a refund, would you like: a. Direct deposit ☐ Yes ☐ No b. To purchase U.S. Savings Bonds ☐ Yes ☐ No c. To split your refund between different accounts ☐ Yes ☐ No
4. If you have a balance due, would you like to make a payment directly from your bank account? ☐ Yes ☐ No
5. Did you live in an area that was declared a Federal disaster area? ☐ Yes ☐ No If yes, where? ____________
6. Did you, or your spouse if filing jointly, receive a letter from the IRS? ☐ Yes ☐ No
7. Would you like information on how to vote and/or how to register to vote? ☐ Yes ☐ No

Many free tax preparation sites operate by receiving grant money or other federal financial assistance. The data from the following questions may be used by this site to apply for these grants or to support continued receipt of financial funding. Your answer will be used only for statistical purposes. These questions are optional.

8. Would you say you can carry on a conversation in English, both understanding & speaking? ☐ Very well ☐ Well ☐ Not well ☐ Not at all ☐ Prefer not to answer
9. Would you say you can read a newspaper or book in English? ☐ Very well ☐ Well ☐ Not well ☐ Not at all ☐ Prefer not to answer
10. Do you or any member of your household have a disability? ☐ Yes ☐ No ☐ Prefer not to answer
11. Are you or your spouse a Veteran from the U.S. Armed Forces? ☐ Yes ☐ No ☐ Prefer not to answer
12. Your race?
    ☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or other Pacific Islander ☐ White ☐ Prefer not to answer
13. Your spouse's race?
    ☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or other Pacific Islander ☐ White ☐ Prefer not to answer
    ☐ No spouse
14. Your ethnicity? ☐ Hispanic or Latino ☐ Not Hispanic or Latino ☐ Prefer not to answer
15. Your spouse's ethnicity? ☐ Hispanic or Latino ☐ Not Hispanic or Latino ☐ Prefer not to answer ☐ No spouse

Additional comments

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Privacy Act and Paperwork Reduction Act Notice

The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory. Our legal right to ask for information is 5 U.S.C. 301. We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224

Form **15080**
(October 2022)

Department of the Treasury - Internal Revenue Service

Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites

Federal Disclosure:

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Terms:

Global Carry Forward of data allows TaxSlayer LLC, the provider of the VITA/TCE tax software, to make your tax return information available to ANY volunteer site participating in the IRS's VITA/TCE program that you select to prepare a tax return in the next filing season. This means you will be able to visit any volunteer site using TaxSlayer next year and have your tax return populate with your current year data, regardless of where you filed your tax return this year. This consent is valid through November 30, 2024.

The tax return information that will be disclosed includes, but is not limited to, demographic, financial and other personally identifiable information, about you, your tax return and your sources of income, which was input into the tax preparation software for the purpose of preparing your tax return. This information includes your name, address, date of birth, phone number, SSN, filing status, occupation, employer's name and address, and the amounts and sources of income, deductions and credits that were claimed on, or contained within, your tax return. The tax return information that will be disclosed also includes the name, SSN, date of birth, and relationship of any dependents that were claimed on your tax return.

You do not need to provide consent for the VITA/TCE partner preparing your tax return this year. Global Carry Forward will assist you only if you visit a different VITA or TCE partner next year that uses TaxSlayer.

Limitation on the Duration of Consent: I/we, the taxpayer, do not wish to limit the duration of the consent of the disclosure of tax return information to a date earlier than presented above (November 30, 2024). If I/we wish to limit the duration of the consent of the disclosure to an earlier date, I/we will deny consent.

Limitation on the Scope of Disclosure: I/we, the taxpayer, do not wish to limit the scope of the disclosure of tax return information further than presented above. If I/we wish to limit the scope of the disclosure of tax return information further than presented above, I/we will deny consent.

Consent:

I/we, the taxpayer, have read the above information.

I/we hereby consent to the disclosure of tax return information described in the Global Carry Forward terms above and allow the tax return preparer to enter a PIN in the tax preparation software on my behalf to verify that I/we consent to the terms of this disclosure.

Primary taxpayer printed name and signature	Date
Secondary taxpayer printed name and signature	Date

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.

PREPARE + PROSPER

TAX INTAKE SHEET

Preferred name(s): ____
(Taxpayer) (Spouse)

What tax returns do you need prepared? *Check all that apply.*

- ☐ 2022 income taxes
- ☐ 2022 renter or homeowner refund
- ☐ Prior year(s): ____________________
- ☐ Other: __________________________

Do these situations apply to you? *If you mark "yes" to any question below, please see a P+P volunteer.*

Yes No Did you have self-employment income? This may be from cash/check/credit card payments or reported on a Form 1099-NEC or form 1099-K.
If yes, was the total income more than $6,000? ☐ Yes ☐ No

Yes No Are you an international student or scholar?

Yes No Did you declare bankruptcy in the tax year you wish to file?

Yes No Did you have income from:
- Renting property to another person
- Active military duty or National Guard duty
- Driving a cab (not including Uber or Lyft)
- Cryptocurrency exchanges

TAXPAYER SURVEY

A. How do you identify?
- ☐ African
- ☐ African American or Black
- ☐ American Indian or Alaskan Native
- ☐ Asian or Pacific Islander
- ☐ Hispanic or Latino
- ☐ Middle Eastern/North African
- ☐ White, Non-Hispanic
- ☐ Multiracial
- ☐ Not listed above, write in: ______________________________

B. Are you or a member of your household considered a person with a disability?
- ☐ Yes
- ☐ No

C. What language do you primarily speak at home?
- ☐ English
- ☐ Spanish
- ☐ Somali
- ☐ Oromo
- ☐ Amharic
- ☐ American Sign Language
- ☐ Hmong
- ☐ Vietnamese
- ☐ Karen
- ☐ Russian
- ☐ Not listed above, write in: _______________

D. What is your gender?
- ☐ Female
- ☐ Male
- ☐ Nonbinary
- ☐ Not listed above, write in: _______________

STAY IN TOUCH

Get tips and news from Prepare + Prosper year-round via email and/or text! We'll contact you about once a month (and not more than three times) and we will never share your information. Message and data rates may apply with texting.

- Email ____
- Would you like to receive text messages from us? ☐ Yes ☐ No

DIRECT DEPOSIT INFORMATION

How do you want to receive your refunds?

- ☐ I don't expect to get a refund and will not need to share my direct deposit information.

I want my **federal refund** to be:

- ☐ all in my savings account
- ☐ all in my checking account
- ☐ split between my savings, checking and/or a U.S. Savings Bond
- ☐ as a paper check delivered by mail

I want my **Minnesota refunds:**

- ☐ all in my savings account
- ☐ all in my checking account
- ☐ as a paper check delivered by mail

Save+Win! Save part or all of your refund and enter to win $100!

Provide a document with your routing and account numbers for your savings and/or checking account or write the information below.

- ☐ I have a voided check or other account document to verify direct deposit information.

SAVINGS ACCOUNT

Routing number: __ __ __ __ __ __ __ __ __

Account number: __ __ __ __ __ __ __ __ __ __ __ __

CHECKING ACCOUNT

Routing number: __ __ __ __ __ __ __ __ __

Account number: __ __ __ __ __ __ __ __ __ __ __ __

LOOKING FOR DIRECT DEPOSIT OPTIONS?

We can help with a new pre-paid debit card, checking, or savings account. Ask a P+P volunteer for more information.

PAYING A BALANCE DUE

! If you do not expect to have a balance due, continue to the next page.

If you have a balance due for your Federal and/or state taxes, how may we help?

I would like to:

- ☐ Receive info on payment options
- ☐ Receive a voucher to pay by check or money order through the mail
- ☐ Pay when filing my taxes through direct debit (automatic withdrawal) from my bank account

  If choosing direct debit, confirm how much and a withdrawal date. Advanced payments can be made up to April 18th.

  - ☐ I authorize a withdrawal of $____________on ________________(date) for payment of my Federal taxes from this account.

    Direct withdrawal from my: ☐ checking account ☐ savings account

  - ☐ I authorize a withdrawal of $____________on ________________(date) for payment of my Minnesota taxes from this account.

    Direct withdrawal from my: ☐ checking account ☐ savings account

Signature ____ Date____________

PERMISSION TO USE YOUR INFORMATION

Review the Prepare + Prosper (P+P) Permission to Use Your Information handout.

If you choose "no" for any of the consents below, P+P cannot e-file your tax return, and you will receive paper copies to sign and mail.

- P+P may keep an electronic copy of my tax return for 3 years. ☐ Yes ☐ No
- P+P may use anonymous data containing tax return dollar amounts for marketing, fundraising, or other non-fundraising activity. ☐ Yes ☐ No
- P+P may disclose my tax return information to TaxSlayer (our tax preparation software) to e-file my tax return, and TaxSlayer may disclose my tax return information to P+P for follow-up. ☐ Yes ☐ No

Taxpayer signature ____ Date ____________

Spouse signature ____ Date ____________

MINNESOTA TAX INFORMATION

1. Were you a resident of Minnesota the entire year? ☐ Yes ☐ No

2. Did you make Minnesota estimated income tax payments in 2022? ☐ Yes ☐ No

If yes, how much did you pay? $________________

3. Did you receive Frontline Worker Pay of $487.45 in 2022? ☐ Yes ☐ No

4. Did you have any student loan debt canceled in 2022? ☐ Yes ☐ No

If yes, amount canceled $________________

5. Did any of the following situations apply to you or your spouse in 2022? Check boxes below.

- ☐ **None of the following situations apply.**
- ☐ Paid education expenses for your child in K-12
- ☐ Made student loan payments
- ☐ Received an AmeriCorps education award
- ☐ Completed a masters degree (teachers only)
- ☐ Made contributions to a 529 College Savings Plan account
- ☐ Paid for long-term care insurance
- ☐ Received military service pension/retirement pay
- ☐ Had a child born in 2022
- ☐ Experienced a stillbirth
- ☐ Donated an organ

RENTERS/HOMEOWNERS + K-12 EDUCATION CREDIT ONLY

Answer the questions below if you have dependents in grades K-12 or if you are a renter or homeowner. All other taxpayers stop here.

1. **Check boxes below if you or your spouse received any of the following nontaxable sources of income.** Do not include income received by your child or any dependents.

- ☐ **I did not receive any nontaxable sources of income.**
- ☐ MN Supplemental Aid (MSA) $___________per month or year
- ☐ Supplemental Security Income (SSI) $___________per month or year
- ☐ MFIP (Minnesota Family Investment Program) $___________per month or year
- ☐ GA (General Assistance) $___________per month or year
- ☐ Emergency Assistance $___________per month or year
- ☐ Housing Support (formerly GRH) $___________per month or year
- ☐ Workers' compensation $___________per month or year
- ☐ Veterans' benefits $___________per month or year
- ☐ Rent reduction received for being a caretaker $___________per month or year
- ☐ Scholarship, fellowship, grants for college $___________Box 5 on Form 1098-T
- ☐ Other nontaxable income, such as: $___________per month or year
  Diversionary Work Payments, HAMP incentives, refugee cash assistance, strike benefits, foster care payments. **Do not include:** Child support, SNAP/food support, or energy assistance.
  Type(s):_____________________________
  ____

2. **Did you rent out part of your home or use it for business?**
☐ Yes ☐ No

3. **Renters: Do you have all of your Certificate(s) of Rent Paid (CRP)?**
☐ Yes ☐ No ☐ Not yet

4. **Homeowners/mobile home owners: Do you have your 2023 Property Tax Statement?**
☐ Yes ☐ No ☐ Not yet

5. **Homeowners/mobile home owners: Did you live with someone who is not listed on your tax return?**
☐ Yes ☐ No

PREPARE + PROSPER

BOOST YOUR MONEY

Check in on your financial health and build your financial well-being with these resources. Check the boxes below to be referred to other Prepare + Prosper (P+P) programs, or to one of our trusted partners. Use these free resources to help navigate your financial life.

Preferred name(s): ____
(taxpayer) (spouse)

Phone number: ________________ Email address: ____________________________ Zip code________

PREPAID DEBIT CARD: The CFR Focus card is available regardless of credit or banking history. This card has no monthly fee or minimum balance required.

☐ I want a CFR Focus card for my refund to be direct deposited.

BANKING ACCOUNTS: P+P's FAIR checking and savings accounts have no overdraft fees or minimum balance requirements, and are available regardless of banking history (excluding bank fraud).

☐ I want to make an appointment to open an account.

SAVE + WIN: Are you saving all or part of your federal or state refund? Enter our drawing to win $100! Every week two savers from Prepare + Prosper will win. Enter to win!

☐ I want to save and enter for a chance to win $100.

US SAVINGS BONDS: You can use part of your federal tax refund to purchase U.S. savings bonds for yourself or as a gift. Purchase bonds in $50 increments up to $5,000.

☐ I want a bond for me: _____________________________________ Amount: _______________

☐ I want a bond for someone else: ____________________________ Amount: _______________

☐ I want another bond for someone else: _______________________ Amount: _______________

MONEY MENTORS FINANCIAL COACHING: Work with a P+P financial coach to set a financial goal and work with you over a six month period to develop a plan to reach it.

☐ I want to work with a financial coach monthly to help me reach my financial goal(s).

CREDIT SERVICES: P+P can help you access your free credit report or (re)build your credit.

☐ I want to get a copy of my credit report today.

☐ I want to fill out a request form today to receive a copy of my free credit report by mail.

☐ I have little or no credit history and want to start building credit using a credit building loan.

FREE FINANCIAL PLANNING: A pro bono Certified Financial Planner CFP® is a financial expert who can meet with you for a one-time consultation on any of the following topics:

☐ Retirement distribution options

☐ Developing a retirement savings plan

☐ Appropriate life insurance coverage

☐ Managing inherited assets

☐ Opening a 529 College Savings plan

☐ Investing

Continue

FINANCIAL COUNSELING: LSS Financial Counselors are certified experts in helping people with the following:

- ☐ Student loans and/or understanding repayment options.
- ☐ Credit card debt.
- ☐ First time home buyers information.

PAYDAY LOAN HELP: Exodus Lending is a nonprofit helping MN families break the cycle of predatory loan debt by enrolling and supporting them in a 0% interest refinance program, lending up to $1,500 to qualified participants.

- ☐ I have a predatory loan and would like more information about getting help.

CHILD SAVINGS ACCOUNTS (Saint Paul Residents Only): College Bound provides a college savings account with $50 for each child who lives in Saint Paul and is born on or after January 1, 2020.

- ☐ I am a resident of Saint Paul and have a child born on or after Jan 1, 2020.
- ☐ I am currently expecting a child and live in Saint Paul.

☐ **I am not interested in any of the programs or services outlined here.**

Consent to share information: By signing below, I give Prepare + Prosper consent to share the above contact information with the organization(s) I am requesting referrals for. Your consent is valid for one year from today.

Signature: ____ Date:________________

For P+P Office Use Only

VOLUNTEER CHECKLIST
When you and a customer identify referrals or services that are right for them, follow this procedure for each one.

☐ **Initial details:** I shared details of the referral or service and ensured the customer is.eligible.

☐ **Resources:** I provided a handout or brochure for each referral/service requested.

☐ **Consents:** The customer signed the consent to share data for each referral/service requested.

☐ **Financial Services Log:** I logged the customer information on paper financial services log.

☐ **Tracking form:** I recorded the customer’s name and the referrals/services requested in the online financial services tracking form **www.tinyurl.com/fstracker2023**

☐ **Next steps:** I explained next steps for each referral/service requested.

NOTES + CFP referral: