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| Client Information Sheet |
| ☐ **Yes**, I would like a financial counselor from Realsense to contact me. |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Your Name (Please Print) | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Spouse’s Name (If Filing a Joint Return) |
| Contact Information: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone Number | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Best time to call |
| **1. Other than English, what language is spoken in your home?*** None
* Spanish
* French
* Other
 | **2. Are you or your spouse a Veteran from the US Armed Force?*** Yes
* No
 | **3. Do you or any member of your household have a disability?** * Yes
* No
 | **4. Was this return prepared using a Virtual or Drop-Off method?*** Yes
* No
 |
| **5. What is your gender?*** Male
* Female
* Couple, MFJ
* Transgender
* Declined to answer

**9. Do you (or any dependent family member) plan to attend college in 2017?** * Yes
* No
 | **6. What is your ethnicity?*** African-American
* Caucasian
* Hispanic or Latino/a
* Asian/Pacific Island
* Native American
* Other
* Declined to answer

**10. Would you like more information or assistance to apply for financial aid?** * Yes
* No
 | **7. Do you have a bank account?*** Checking & Savings
* Checking
* Savings
* Would like one
* Not interested
* Declined to answer

**11. Are you interested in becoming a Realsense United Way volunteer?*** Yes
* No
 | **8. How did you have your taxes done last year?*** Here
* Another free place
* Paid w/ instant loan
* Paid, w/ no loan
* Did my own
* Did not file
* First year filing
* Declined to answer

**12. How did you hear about Realsense VITA?*** Return client
* Radio or TV ad
* Web or social media
* Flier or print ad
* Workplace
* Declined to answer
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| The information that you provide here will be used solely for the purpose of connecting you with additional resources offered by RealSense, United Way and its partners. Periodically, you may receive communication from us about other services or events that may be of interest to you or someone you know. If you wish to discontinue receiving communication from RealSense, you may unsubscribe or opt out at any time. Your information will not be shared, sold, given away or used for commercial purposes. |
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| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Your Signature | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Spouse’s Signature (If Filing a Joint Return) |
| **For more information, visit us online at: www.unitedwaynefl.org/realsense** |