

# Due Diligence - Notes

(This page is not filed with the return. It is for your records only.)

**2021**

Name(s) as shown on return

Tax ID Number

Use the notes fields below to document any additional inquiries made by the tax return preparer to help determine if the information furnished by the taxpayer is complete and correct.

Date of interview

Name of taxpayer interviewed

Taxpayer interviewed by

Note: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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Note: \_\_\_\_\_  
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Note: \_\_\_\_\_  
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Your signature	Date	Spouse's signature. If joint return, BOTH must sign.	Date
Paid preparer's signature	Date		