

Intake Form

NOTE: Please be certain to read, understand, sign, and return the Service Agreement along with this intake form.

Required Information:

Taxpayer name and address [As shown on ID]: _____

Taxpayer identification number(s): _____

Date of Birth: _____

Place of Birth: _____

Full Names of Beneficiary #1: _____

Full Names of Beneficiary #2: _____

Full Names of Beneficiary #3: _____

Full Names of Beneficiary #4: _____

Full Names of Beneficiary #5: _____

Package(s) number(s) for the service(s) you are requesting: _____

Have you read, understood, signed, and returned the Service Agreement? Y/N?

Taxpayer's email address:

Taxpayer's phone number:

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LOAN INFORMATION

Type of Account circle all that apply: [car, mortgage, credit cards, personal, student]

Name of Lending Company:

Company mailing address:

Company Phone number:

Company EIN:

Account Number(s):

Date loan originated:

Loan amount:

Open or Closed [circle one]

[If closed has a Cusip request been completed on the loan]:

A copy of the loan documentation must be provided.

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COURT CASE

Court Case Type circle one: [Criminal, Civil, Child Support]

Name of Courthouse:

Address of Court:

Name of Clerk of the Court:

Name of Judge:

Name of Magistrate:

Court Administrator:

Court Case Number:

Cusip result:

Bond Amount:

Banking Deposits

Bank Name:

Bank Address:

Account Number:

Deposit total for each year:

Trademarks

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Service Agreement

This Agreement ("**Agreement**") is made and entered into as of the ___ day of _____, 202__ by and between:

The Freeway, heron known as ("**Service Provider**"), and _____ heron known as ("**Client**"), with:

- The Department of State Health Services Vital Statistics Number: _____ (Birth Certificate Registration Number)

Collectively referred to as the "**Parties**".

RECITALS

WHEREAS, the Service Provider offers services for the preparation of documents as prescribed on the Services Listing.

WHEREAS, the Client desires to engage the Service Provider for the aforementioned services;

NOW, THEREFORE, in consideration of the mutual covenants and agreements herein contained, the Parties hereto agree as follows:

1. Services Provided

The Services Provider agrees to provide the specific service package selected by the Client and provide that package back to the Client. The Client agrees to make themselves available to the Service Technician that is preparing the documentation, to ensure that the information provided on the Intake Form is accurate and complete, and to make themselves available to the Service Technician for a final review and editing of the package if errors are found.

2. Consideration

The Client will provide the Service Provider with the stated consideration/gift for the services requested before the services are started.

3. Agreement Execution

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The Service Provider will complete the services within Seven (7) business days after receipt of both the completed Intake Form, a signed Service Agreement, and the appropriate consideration has been received by the Service Provider. NOT INCLUDING WEEKENDS AND HOLIDAYS.

The completion date may be extended IF the selected package includes obtaining a CUSIP search. As the turn around time for the CUSIP search is handled by a Third-Party Provider.

Once the package has been returned to the Client the Service Provider/Service Technician's obligation to the agreement is complete and final. No extra consultation is required or can be demanded without the Client signing a new agreement and additional consideration.

4. Hold Harmless Clause

The Client agrees to indemnify, defend, and hold harmless the Service Provider/Service Technician from any and all actions, losses, damages, liabilities, judgments, grants, costs, and expenses including reasonable attorney's fees, arising from the services provided stated in this agreement.

5. Entire Agreement

This Service Agreement constitutes the entire understanding between the Parties with respect to the subject matter hereof and supersedes all prior and contemporaneous agreements, representations, and understandings of the Parties.

6. Amendments

This Agreement may be amended or modified only by a written agreement signed by both Parties.

7. Governing Law

This Agreement shall be governed by and construed in accordance with the laws of all the 50 States of North America and all the outlying territories.

8. Signatures and Date

IN WITNESS WHEREOF, the Parties hereto have executed this Agreement as of the day and year stated next to their respective signatures.

Date: _____

Date: _____

(Client's Printed Name)

(Company Printed Name)

(Client's Signature)

(Service Provider's Signature)

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