



# CLIENT DATA SHEET

**NAME** \_\_\_\_\_ **PHONE NO** \_\_\_\_\_  
**ADDRESS** \_\_\_\_\_ **Home** \_\_\_\_\_  
 \_\_\_\_\_ **Cell** \_\_\_\_\_  
 \_\_\_\_\_ **Email** \_\_\_\_\_  
 \_\_\_\_\_

**REQUIRED INFORMATION** **IF NEW CLIENT,**  
 WE NEED A COPY OF ALL SOCIAL SECURITY CARDS AND A VALID DRIVER LICENSE FOR TAXPAYER & SPOUSE  
 ALSO A COPY OF LAST YEARS TAX RETURN IF AVAILABLE

	NAME	SS#	DATE OF BIRTH
Taxpayer:	_____	_____	_____
Spouse:	_____	_____	_____
Dependents:	_____	_____	_____
	_____	_____	_____

**Child Under 17** \*\*Required by IRS to provide documentation that child lives with taxpayer  
 If License was renewed for Taxpayer or spouse in 2021, please bring to office

**ANY ONE IN COLLEGE** YES  NO  (If Yes, please provide Form 1098-T from school)

**WERE ANY OF THE ABOVE COVERED BY MARKET PLACE INSURANCE LAST YEAR?**  
 YES  NO

IF YES: YOU MUST HAVE THE 1095A FORM

**FOR 2021:** Did you receive the \$1400.00 Economic Stimulus Payment? YES  NO   
 If YES: Amount Received \_\_\_\_\_

**Has your Filing Status Changed from 2020:** (for example: filed Single in 2020, but filing Married in 2021)  
 YES  NO  If YES, explain: \_\_\_\_\_

**DID YOU RECEIVE THE ADVANCE CHILD TAX CREDIT, IF SO WE NEED TAX FORM RECEIVED FROM IRS**

**FOR 2021 you are able to deduct \$300/\$600 MFJ cash payments to qualified non-profit, even if you do not itemize.**

Please Provide information including Charity name(s), dates, and Amount(s) donated.

**DO YOU CERTIFY THAT NO CONSUMER USE TAX IS DUE TO NORTH CAROLINA**   
**IF RECEIVING A REFUND, IS IT GOING TO OR THROUGH AN ACCOUNT OUTSIDE OF THE UNITED STATES**  
 YES  NO

**DO YOU WANT TO DIRECT DEPOSIT** **SAME ACCOUNT AS LAST YEAR**  
 YES  NO  YES  NO

**IS TAXPAYER A VETERAN?** \_\_\_\_\_ **IS SPOUSE A VETERAN?** \_\_\_\_\_

**AT ANYTIME DURING 2021 DID YOU DEAL IN ANY VIRTUAL CURRENCY** YES  NO

You are responsible for the information on your return, please provide complete and accurate information.

**SIGNATURE:** \_\_\_\_\_

**DATE** \_\_\_\_\_