



CLIENT DATA SHEET- 2023

1533 Cahaj Mountain Rd
Hudson, NC 28638
828-396-7165

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
 NEW CLIENTS 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 2022, 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

AT ANYTIME DURING 2023 DID YOU BUY OR SALE HOME, PROPERTY, STOCK, ETC YES NO

EXPLAIN: _____

Has your Filing Status Changed from 2022: (for example: filed Single in 2022, but filing Married in 2023)

YES NO If YES, explain: _____

AT ANYTIME DURING 2023 DID YOU DEAL IN ANY VIRTUAL CURRENCY YES _____ NO _____

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?** _____

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

SIGNATURE: _____

DATE _____