



CLIENT DATA SHEET- 2024

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

NAME _____

ADDRESS _____

PHONE NO

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 2024, 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 2024 DID YOU BUY OR SALE HOME, PROPERTY, STOCK, ETC YES NO

EXPLAIN: _____

Has your Filing Status Changed from 2023: (for example: filed Single in 2023, but filing Married in 2024)

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

YES NO

SAME ACCOUNT AS LAST YEAR

YES NO

IS TAXPAYER A VETERAN? _____

IS SPOUSE A VETERAN? _____

Check box if you would like to opt-in to SMS (Text Messaging) communication? (optional)

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

SIGNATURE: _____