



# 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?** \_\_\_\_\_

**Do you consent to SMS (Text Messaging) communication?** Yes       No

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

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