



# DownSouth

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## Accounting & Tax

1025-D Director Court  
Greenville, North Carolina 27858  
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# Client Interview Sheet

Name of Taxpayer		SS#		
		<i>First</i> <i>M.I.</i> <i>Last</i>		
Occupation		Date of birth	Driver's License No. and State	
Email			DL Issue Date	DL Expiration Date
Address		City	State	Zip
County		Home phone	Work or cell	
Name of Spouse		SS#		
		<i>First</i> <i>M.I.</i> <i>Last</i>		
Occupation		Date of birth	Driver's License No. and State	
Email			DL Issue Date	DL Expiration Date
Address		City	State	Zip
County		Home phone	Work or cell	

Filing status:  Single  Married Filing Jointly  Married Filing Separately  Surviving Spouse  Head of Household

Did you live or work in any states other than NC in 2025? Yes No.

Did you have health insurance from the Marketplace (Obamacare) at any time during last year? Yes (if yes, include 1095A) No

Have you received any notice from the IRS or state revenue department within the past year? Yes No

At any time during 2025, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset) (Cryptocurrency, NFTs, etc.)? Yes No

Bank Account for Direct Deposit (or Direct Debit): Routing No. \_\_\_\_\_ Account No. \_\_\_\_\_

**Names of dependent children**

<i>Child's full name</i>	<i>Social Security #</i>	<i>Date of birth</i>	<i>Months lived in home in 2024</i>	<i>Relationship to taxpayer</i>	<i>College student?</i>

Did any of the children have income for the year? Yes No

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for the tax year? Yes  No

**Other dependents or people who lived with you**

<i>Name</i>	<i>Social Security #</i>	<i>Date of birth</i>	<i>Relationship</i>	<i>Income</i>