**CLIENT TAX NOTES – TY2022**

**PERSONAL INFORMATION:**

1. LAST NAME:

2. MIDDLE NAME:

3. FIRST NAME:

4. OCCUPATION:

5. DOB:

6. EMAIL ID:

7. CONTACT NO:

8. CURRENT ADDRESS:

9. MARITAL STATUS ON 31ST DEC 2022:

10. VISA STATUS ON 31ST DEC 2022:

11. NO OF MONTHS STAYED IN US IN THE YEAR 2022:

12. STATE LIVED IN US IN 2022(MENTION NAME & DATE IF LIVED MORE THAN ONE STATE):

13. ANY LOANS IN INDIA OR USA:

14. FIRST PORT OF ENTRY DATE (YEAR) TO USA :

15. SSN:

**SPOUSE DETAILS:**

1. LAST NAME:

2. FIRST NAME:

3. ITIN/SSN:

4. DOB:

5. OCCUPATION:

 6. EMAIL ID:

7. CONTACT NO:

**KIDS DETAILS:**

1. LAST NAME:

2. FIRST NAME:

3. ITIN/SSN:

4. DOB:

5. Amount received as child tax credit in 2022 :

**KIDS DETAILS:**

1. Last name:

2. First name:

3. ITIN/SSN:

4. DOB:

5. Amount received as child tax credit in 2022 :