**CLIENT TAX NOTES – TY2023**

**PERSONAL INFORMATION:**

1. LAST NAME:

2. MIDDLE NAME:

3. FIRST NAME:

4. SSN:

5. OCCUPATION:

6. DOB:

7. EMAIL ID:

8. CONTACT NO:

9. CURRENT ADDRESS:

10. MARITAL STATUS ON 31ST DEC 2023:

11. VISA TYPE ON 31ST DEC 2023:

12. NO OF MONTHS STAYED IN US IN THE YEAR 2023:

13. STATE LIVED IN US IN 2023(MENTION NAME & DATE IF LIVED MORE THAN ONE STATE):

14. ANY LOANS IN INDIA OR USA:

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

16. IS THIS FIRST TIME FILING (YES/NO) :

**SPOUSE DETAILS:**

1. LAST NAME:

2. FIRST NAME:

3. ITIN/SSN:

4. DOB:

5. OCCUPATION:

6. VISA TYPE :

7. EMAIL ID:

8. CONTACT NO:

**KIDS DETAILS:**

1. LAST NAME:

2. FIRST NAME:

3. ITIN/SSN:

4. DOB:

**KIDS DETAILS:**

1. Last name:

2. First name:

3. ITIN/SSN:

4. DOB: