Cary Scenario

Sheldon is single with no dependents.

Sheldon was injured on the job and was not able to work while healing.

Prior to his injury, he worked and earned wages.

As seen in his w2 shows his non-taxable sick pay and the wages he earned prior to his injury.



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Customer Data Sheet

We Must see a PHOTO

Primary Name (as shown on SS Card) Sheldon Cary			Spouse Name (as shown on SS Card)						
Social Security # 400-00-1128	Date of Birth (MM/DD 07/14/90	D/YYYY)	Social Secur	Social Security # Date of Birth (MM/DD/Y					
Can anyone claim you as a Were you married as of Dec 31st	NO	If married, Live together? Y or N If no when did you separate?(MM/DD/YYYY)							
Occupation:					• •	. ,			
Occupation: Email Address: caryhorse12@yahoo.com			Occupation: Email Address:						
Address IRS can send notice	City:	State: Zip:							
9653 Cherry St	3 10.	Union City	1 '		TN		38261		
Phone: Primary 731-377-80	1	Phone: Spou	ise		I				
Dependents:			•						
Name [SSA	‡	SS Card (Y or N) Relation		nship	Months in Home in 2023		
		DEPENI	DENITO						
	Can anyo	one else claim your depen		ove? YES or NO	>				
Did you, any dependents, o						ES OR (TO)			
Do you or you spouse owe t	he IRS or have Student	Loan debt?	Who o	wes the debt?					
If you cannot provide all y information you will need	=		es and could	possibly owe	=	-			
DIRECT DEPOSIT ALITHO	RIZATIONI FORM			DRIVERS	LICENSE	INFORMA ⁻	FION		
DIRECT DEPOSIT AUTHORIZATION FORM				LICENSE NUMBER					
Name of Financial Institution				ISSUE DATE					
Routing #				EXPIRATION DATE					
Account #				<u>=/</u>					
Type of Account: Checking/ Prepaid Card/ Savings				LICENSE NUMBER					
				ISSUE DATE					
By signing below you certify that all the information is true, correct, and comp			lete:	EXPIRATION DATE					
Sheldon Ca	ry								
Primary	<i>U</i>	Date	7						
/_									
Spouse		Date							
Did you use any orPa		ring the tax year' UberLyf		acart _[DoorDas	sh			
Did you sell any ite Facebook Marke		ese apps during azonEbay	the tax ye	ear?					