

Welcome to Bernie Clayton Insurance / Accusure Tax Services!

PDS Sheet Version

2.0.3R 2025-07-28 ADT

Personal Data Sheet

Basic Client Info

First Name		Middle/Initial		Last Name	
Nickname		Sex		DOB	
Marital Status		Citizenship		Smoker?	
Home Phone				<u>Driver's</u>	DL#
<u>Contact</u>	Cell Phone			<u>License ---></u>	DL State
<u>Info---></u>	Work Phone			<u>Info</u>	DL Issue Date
Fax Phone					DL Expiration Date
				Personal Email	
				Work Email	

Spouse/Children/Dependent Info

Emails --->

First Name	Last Name	Sex	DOB	SSN#	Relation to You

Who/What referred you to us?

Referral Date

Home Address

Street					
City		State		ZIP Code	
Years at address		Residency		Condo	Mobile Home
				House	Apartment
				Other	

Mailing Address (Only list if different from Home)

Street					
City		State		ZIP Code	

Employment/Education

Employer				
Occupation				

No Diploma HS Diploma/GED Some College Associate's
 Bachelor's Master's Doctor's Military Trade
 Highest Education

Client Signature

Today's Date