

KIMBERLY A. HARDESTY PSC

CERTIFIED PUBLIC ACCOUNTANT

Existing Client

Name: _____

Phone Number: _____ Email Address: _____

Preferred Method of Contact: Phone Text Email

We will need **date of birth** and **social security numbers for each family member** listed on your tax return.

Has your Address Changed, (If address changed please write below)	Yes	No	Market Place Insurance (If yes, is 1095-A included in tax documents)	Yes	No
Dependent/Marital Change (if yes, please indicate below)	Yes	No	Have you paid Estimates (If yes, is breakdown included in tax documents if not please include below)	Yes	No
Did you have OT or tips	Yes	No	1st _____	3rd _____	
If Yes, is it included on the W2	Yes	No	2nd _____	4th _____	

DO WE HAVE EVERYTHING TO FINALIZE YOUR RETURN? _____ IF NO, PLEASE EXPLAIN BELOW

Additional Comments: _____

Signature: _____ Date: _____

KIMBERLY A. HARDESTY PSC

CERTIFIED PUBLIC ACCOUNTANT

New Client

Name: _____

Phone Number: _____ Email Address: _____

Preferred Method of Contact: Phone Text Email

Marital Status Single Married Filing Joint Head of House Address: _____

<u>Name</u> _____ _____ _____ _____	<u>Social</u> _____ _____ _____ _____	<u>Birth Date</u> _____ _____ _____ _____	Previous _____ _____ _____ _____	Return Included _____ _____ _____ _____	Yes _____ _____ _____ _____	No _____ _____ _____ _____
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Market Place Insurance

Yes

Did you have OT or tips

Yes

If Yes, is it included on W2

Yes

**We need all individuals that are included on the return
to be listed above or on the back**

DO WE HAVE EVERYTHING TO FINALIZE YOUR RETURN? _____ IF NO, PLEASE EXPLAIN BELOW

Additional Comments: _____

Signature: _____ Date: _____

KIMBERLY A. HARDESTY PSC

CERTIFIED PUBLIC ACCOUNTANT

Business

Business Name: _____

Phone Number: _____ Email Address: _____

Preferred Method of Contact: Phone Text Email

Has the business Address Changed If dropping QuickBooks file off.

Yes No Version of QB: _____

Has any Owner/Officer had an address change Username: _____

Yes No Password: _____

Has any Percentage of Ownership Changed If using Quickbooks Online does Kim have access?

Yes No If no, invite can be sent to kim@hardestycpa.com

DO WE HAVE EVERYTHING TO FINALIZE YOUR RETURN? _____ IF NO, PLEASE EXPLAIN BELOW

Additional Comments: _____

Signature: _____ Date: _____