

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
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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
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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
_____	_____	_____			
_____	_____	_____	Market Place Insurance	Yes	No
_____	_____	_____			
_____	_____	_____	Did you have OT or tips	Yes	No
			If Yes, is it included on W2	Yes	No

**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: _____

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CERTIFIED PUBLIC ACCOUNTANT

Business

Business Name: _____

Phone Number: _____ Email Address: _____

Preferred Method of Contact: Phone Text Email

Has the business Address Changed	Yes	No	If dropping QuickBooks file off.	Version of QB:	_____
Has any Owner/Officer had an address change	Yes	No		Username:	_____
				Password:	_____
Has any Percentage of Ownership Changed	Yes	No	If using Quickbooks Online does Kim have access? 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: _____