

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

Any Sale of Bitcoin Yes No 1st _____ 3rd _____ 2nd _____ 4th _____

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 We need date of birth and social security numbers for each family member listed on your return. Please list those on back or below.

Number of Dependents _____ Market Place Insurance Yes No

Address: _____ Any Sale of Bitcoin Yes No

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			
	Yes	No	If using Quickbooks Online does Kim have access?
			If no, invite can be sent to kim@hardestycpa.com

Additional Comments: _____

Signature: _____ Date: _____