

Hurst, Kelly & Company LLC, Certified Public Accountants - New Client Application*

Today's Date	<hr/>	
Your Name	<hr/>	
Spouse's Name (if married)	<hr/>	
Your Email Address	<hr/>	
Your Mailing Address	<hr/>	
Last Four of Your SSN	<hr/>	
Are you current on all tax filings and payments?	Yes	No
Have you ever been audited?	Yes	No
If Yes, for what years and by which taxing authorities?	<hr/>	
Have you filed bankruptcy?	Yes	No
If Yes, in what year?	<hr/>	
Are you currently using a CPA firm?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If currently using a CPA firm, are you interested in switching primarily as a result of fees being too high?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<hr/>		
(Please be aware that our fee for a simple, basic Form 1040, and one state, starts at \$750.00.)		
If currently using a CPA firm, are there reasons other than fees that have you interested in switching? If yes, please describe	N/A <input type="checkbox"/>	
If you are not currently using a CPA firm, why are you interested in using a CPA firm now?	N/A	
Are your returns normally completed by the original due date or extended due date?	Original Due Date	Extended Due Date
How did you hear about Hurst, Kelly & Company LLC	<hr/>	
If someone referred you, please provide their full name	<hr/>	
Will anything be different on your current year returns compared to your prior year returns?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If Yes, please provide an explanation of what is different	<hr/>	

**Email completed application to info@hurstkelly.com along with a pdf of your most recent tax returns.
A team member will follow up with you to let you know if you have been accepted into the practice.**

*Where we can leverage our expertise and resources to create value and foster a long-term mutually beneficial relationship, our firm is currently accepting new clients. We do not, however, accept all clients, as we focus and control the direction of our practice to make sure that we maintain our service levels and are able to consistently deliver a high-quality product with a high level of service. If you are accepted into our practice, a team member will provide you with a fee quote for our services. Our fees are charged based on the complexity of the work and the amount of professional time needed to perform the underlying work. Basic tax preparation services for a simple 1040 and one state start at \$750.00. Applications are normally processed and client contacted in 2 business days.