

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

Your Name		
Spouse's Name (if married)		
Your Cell Phone Number		
Your Email Address		
Your Mailing Address		
Last Four of Your Social Security Number		
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?		
Have you filed bankruptcy?	Yes	No
If Yes, in what year?		
Are you currently using a CPA firm?	Yes	No
If Yes, why are you interested in switching?		
If No, why are you interested in using a CPA firm now?		
Are you 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		
If someone referred you, please provide their full name		
Is there anything that will be different on your current year returns compared to your prior year returns?	Yes	No
If Yes, please provide an explanation of what is different		

**Email completed application to [info@hurstkelly.com](mailto: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 start at \$500.00. Applications are normally processed and client contacted in 2 business days.