

NEW Client Questionnaire: Harvey & Caldwell

Have you been victim of Identity theft? YES /NO
IF Yes do you have an IP PIN YES / NO
Do you have Bookkeeping that needs to be done? YES / NO

Tax Year (s)

Date Dropped Off

Dropped Off With

Peace of Mind (POM) YES / NO

Approve Online (AOL) YES / NO

WE NEED A COPY OF YOUR 2017 TAX RETURN!!

How did you hear about us?

E-file return? YES / NO

(If no, there will be a \$90 fee)

Direct Deposit? YES / NO

(Please attach signed DD form)

Client Name: _____

Current Address: _____

Email: _____

Preferred

Day Phone: _____

Evening Phone: _____

Cell Phone: _____

of Mos. Lived
with you during
the year

Family Member Information:

Name

Date of Birth

SSN/TIN

the year

Taxpayer: _____

Spouse (even if filing separate): _____

Dependent 1: _____

Dependent 2: _____

Dependent 3: _____

(Additional dependents may be listed below)

*Due to NEW IRS regulations, we need birthdays & social security cards for each member of the family.

*If you adopted last year, we need a copy of the adoption papers.

Did you get married or divorced in 2017? Yes / No

If so, we will need copy of divorce decree or marriage license and new social security card.

Did you have health insurance for all of 2018, YES or NO

If yes due to IRS regulations we need to retain a copy of the 1095A, 1095B or 1095C

Notice: If you do not fill out the sheet entirely, you will be charged a \$50 rerun fee if we have to make changes to the return.

Signature _____ Date _____