

Kirkey & Co., Inc.

Certified Public Accountants

New Client Questionnaire

Name _____ *The average fee for preparing*
Address _____ *individual returns is between*
City _____ *\$325 and \$450.00*
State _____ ZIP _____
Home Phone _____ Work Phone _____
Cell Phone _____
Email _____
Occupation _____
Annual Gross Income _____ Net Worth _____
Referred by _____

Last return year filed _____

Prior returns were: Self-prepared ☐ Professionally prepared ☐

Do you have any outstanding tax debts from prior years?

Have you ever been audited by the IRS?

Have you ever declared bankruptcy?

Y	N
Y	N
Y	N

Services Requested (check all that apply)

Personal Tax Preparation
Business Tax Preparation
Trust/Estate Tax Preparation
Tax Planning
Financial Planning
Investment Management
Accounting / Bookkeeping
Payroll

Types of Income (check all that apply)

Salary & Wages
Self-employment
S Corporation
LLC / Partnership
Retirement
Investments
