the harding group inc.
SMALL BUSINESS ACCOUNTING

QUESTIONNAIRE FOR 2011 PERSONAL TAX RETURNS

Please also complete the Questionnaire for 2011 Business Tax Returns if you have a sole proprietorship, LLC, corporation or partnership.

Client name: ______________________ **Email address:** ______________________

Phone number (at least one)**:** ______________________

Filing status (as of 12/31/2011)**:**
☐ Married Filing Joint ☐ Married Filing Separate ☐ Single ☐ Head of Household ☐ I don't know

Returns to be completed: ☐ Federal ☐ MD ☐ DC ☐ VA ☐ ______ Other (write in)

☐ New address: ______________________
☐ Update to dependents (name, dob, ssn): ______________________
☐ Add or ☐ Remove: ______________________
☐ College expenses have been included

Refund: ☐ Direct deposit (voided check included) ☐ Prefer check

Retirement: ☐ Contribution made (info included) ☐ Let's discuss ☐ Not interested

New clients:
☐ Prior year tax return has been included
Dates of birth for everyone on the return ______________________

Tax filing due dates:

April 15th, unless extended (info submitted by 3/15)
October 15th if extended (see extension info below)

Tax payment due dates:

April 15th (extending the return extends the time you have to file, not the time you have to pay)

☐ Request estimate of amount to pay with extension

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Timing of work: We process taxes in the order they are received. Early in the season we can complete corporate taxes in a couple of weeks or so (which allows us some time to go back and forth with questions). We typically finish all the returns that are submitted by March 31st on time (by April 15th), but if you want to be sure yours gets done, please allow us one month. If you need your return more quickly, please let us know.

Extensions: We automatically extend all returns that come in after March 15th. We do this electronically assuming no balance is due. If you think you might need to make a payment with your extension, please let us know well in advance so we can help estimate your payment.

Our fees: We charge by form which means that our fees are calculated by adding up the fee for each form in your tax return. We won't know your exact fee until your return is complete, but feel free to contact us for an estimate. We will email you an invoice as soon as we have completed your return. Once we receive payment (by cash, check, Master Card or VISA) we'll post the return to your portal for you to review.

Security: We strive to maintain confidentiality of your records at all times. That is your right and our responsibility. To that end, we have established a secure client portal for you that you can access from our website. This portal is the only secure way for us to share electronic information with you. We are not permitted to email tax returns or other documents that contain sensitive information. It is also a way for you to securely share files and documents with us.

Fraud: We are not responsible in any way for detecting fraud or illegal acts. But, on the off chance that we notice something suspicious, you will be notified right away.

Quality: We strive to provide exceptional service, with a commitment to accuracy and timeliness. If at any time you don't feel that we are living up to that ideal, I would welcome your feedback so that we can remedy the situation. We will be working from the information you provide. We will take the time to ask questions to clarify things and/or request additional information as necessary to produce an accurate and complete tax return. But the quality of the output is directly related to the quality of the input, so we appreciate your attention to detail.

Questions or Comments:

Client Signature: ______________________ **Date:** ____________

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