

Angela's Tax Service, LLC

Date Received: _____

New Client: Yes No

Taxpayer's Name: _____

Spouse: _____

PH#: _____

PH#: _____

Email: _____

Email: _____

SS#: _____

SS#: _____

Date of Birth: _____

Date of Birth: _____

Current Address: _____ City/ST/Zip: _____

Filing Status: Single Married Filing Joint Married Filing Separate HOH Qualifying Widower

Dependents:

Name:	Date of Birth:	Relationship to you:	SS#:

Were you a resident of CO all year? Yes No

If **NO**: Other State(s) of residency: _____

Date moved to CO: _____

Do you have an identity protection PIN number from the IRS? Yes No *If Yes, please be sure to include*

Do you have any of the following and are ALL the documents included and organized?

*(Please note: There will be an additional charge of \$55/hr. to separate and organize receipts.)

Own you own business/Independent Contractor (Schedule C)

Rental Property (Schedule E)

Farm Income (Schedule F)

At any time during 2020, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) **located in a foreign country**?

Yes No

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any **virtual currency** (i.e. Bitcoin...)? Yes No

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At any time during 2020, did you have health insurance coverage purchased through the marketplace (i.e. Health First Colorado)? Yes No *If Yes, we will need Form 1095A*

If you receive a refund would you like it to be Direct Deposited? Yes No

*If YES: ●Routing: _____ Checking
●Account: _____ Savings

*If NO: How would you like to receive your refund?

Via E1 Visa Card *Please see brochure for Visa Card Details*

Via Check

Would you like Angela's fee to be deducted from you refund? Yes No

*(Please note: There is an additional fee for this service.)

**If YES: Please answer ONE of the following security questions.

Mother's maiden name?

What high school you attended?

Name of your first pet?

Father's middle name?

Name of your oldest child

Answer: _____

*For Returning Clients: Have there been any changes from the previous year's tax returns? If so, please give details: _____

*Notes for new clients: _____
