



Texas Tax Angels & Bookkeeping LLC

Tax Year 2024 Client Data Packet

Please read the directions below regarding the necessary forms to process your tax return.

- ❖ ALL forms in this packet MUST be completed thoroughly.
- ❖ Read the “Engagement Letter” fully, then sign and date.
- ❖ Please do NOT answer “same” - the questions for 2024 Tax Year are *different* than the questions for the previous tax year.
- ❖ If you are filing *single*, please do not answer any questions solely addressed to “Spouse”.
- ❖ Once you have completed this packet, please give it and your tax documents to a Texas Tax Angels staff member.
- ❖ Provide Driver’s License or Passport to be copied (Taxpayer and Spouse)
- ❖ Provide Social Security Card(s) to be copied. (Taxpayer, Spouse, & Dependents)

We will review your questionnaire and tax documents. If we find that additional information/documents are needed, we will contact you and/or your spouse.