

Infinite Tax Solutions, LLC

4840 Pearl East Circle STE 210E, Boulder, CO 80301
(720) 263-1288 office
(720) 398-3370 fax

**Tax Planning, Tax Preparation,
Audit Defense and Resolution**

New Client Information Form

Name: _____ Date: _____ ☐ Invite to Portal

Please tell us how you found our firm:

☐ Website: _____ ☐ Other Ad: _____ ☐ Referral: _____

Address:

Date began living there: _____

Do you: Rent ☐ Own ☐

Your Social Security Number:

Your Date of Birth: _____

Contact Information:

Cell: _____

Home: _____

Work: _____

Email: _____

Spouse's Name: _____

Spouse's Social Security Number: _____

Date of Marriage: _____ Date of Birth: _____

Cell: _____

Email: _____

Children (Dependents):

Date of Birth:

Social Security Number:

Additional Questions:

Filed for bankruptcy? If yes, please provide details _____

Been involved in any lawsuit, either as a plaintiff or defendant? If yes, please provide details _____

Been involved in any criminal proceeding? If yes, please provide details _____

Been involved in any tax audit or other tax issue? If yes, please provide details _____
