



## 2023 Angel Investor Tax Credit Program- Angel Investor Application

PLEASE NOTE THERE IS NO OPTION TO SAVE YOUR APPLICATION AND RETURN TO IT AT A LATER TIME. PLEASE HAVE ALL YOUR RESPONSES AND DOCUMENTATION READY TO COMPLETE THE APPLICATION IN ITS ENTIRETY.

Investor First Name \*

Investor Last Name \*

Investor Street Address \*

Investor City \*

Investor State \*

Investor Zip Code \*

Email Address \*

Contact phone number \*

What is the name of the business you have made an investment in during calendar year 2023? \*

Please note if you have made investments in more than 1 business, you will need to complete a separate application for each.

Date of Investment \*

To qualify for this round of the program this date must be between January 1, 2023 and December 31, 2023.

mm/dd/yyyy

Qualifying Investment Amount \*

Was the qualifying investment made through a separate entity, trust or group? \*

Are you representing an investment made by an Angel Investor group? If so, please upload a document outlining the names and address of all investors and the prorated amount invested.

 Drop files here

Name of Angel Investor Group

Was this investment made through a trust? \*

Investment Legal Instrument \*

Please upload a copy of the executed legal instrument which documents your investment in the qualifying business.

 Drop files here

Accredited Investor Certification \*

Please upload a letter from the Taxpayer Investor's certified public accountant or lawyer, each of which must be in good standing within the Commonwealth of Massachusetts, with a representation that such professional has taken reasonable steps to verify the Taxpayer Investor's net income or net worth and any other requirements as defined by the United

States Securities and Exchange Commission to establish accredited investor status, pursuant to 17 USC § 230.501(a).

⬇ Drop files here

## Certificate of Good Standing- Department of Revenue \*

A Certificate of Good Standing is a certificate issued by the Massachusetts Department of Revenue (DOR) indicating that a corporation, individual, sole proprietor, non-profit organization, partnership, limited liability company, limited liability partnership, trust or any other entity registered and filing taxes in Massachusetts has filed all necessary tax returns and is deemed in good standing by the Massachusetts Department of Revenue.

Please upload a copy of your certificate issued by DOR within the previous 6 months.

Please make every effort to obtain this certificate by the time of submitting your application. If you have not received it by then, please upload proof that you have applied for it and send us the certificate within 14 days of the program deadline by emailing it to [angeltax@masslifesciences.com](mailto:angeltax@masslifesciences.com).

⬇ Drop files here

## Public Disclosure: Important Notice to Applicants (Please read and check the box to acknowledge.) \*

If an applicant is awarded an Angel Investor Tax Credit, the awardee is subject to public disclosure, including but not limited to being listed as an Angel Investor in the MLSC Annual Report and other published information relative to the Angel Investor Tax Credit program.

The MLSC is subject to the requirements concerning disclosure of public records under the Massachusetts Public Records Act, M.G.L. c. 66 (Public Records Act), which governs the retention, disposition and archiving of public records. For purposes of the Public Records Act, "public records" include all books, papers, maps, photographs, recorded tapes, financial statements, statistical tabulations, or other documentary materials or data, regardless of physical form or characteristics, made or received by the MLSC. As a result, any information submitted to the MLSC by an applicant and/or awardee is subject to public disclosure as set forth in the Public Records Act.

The foregoing notwithstanding, "public records" do not include certain materials or data which fall within a specifically enumerated exemption set forth in the MLSC's enabling act, M.G.L. Chapter 23I. Such exemption that may be applicable to documents submitted by an applicant and/or awardee is for any documentary materials or data made or received by the MLSC that consists of trade secrets or commercial or financial information regarding the operation of any business conducted by the applicant and/or awardee, or regarding the competitive position of such applicant and/or awardee in a particular field of endeavor (Trade Secrets Exemption). In the event that an applicant and/or awardee wishes to submit certain documents to the MLSC and believes such a document or documents may be proprietary in nature and may fall within the parameters of the Trade Secrets Exemption, the applicant and/or awardee should identify such materials in its application as Confidential.

How did you hear about the program? \*

Select an option

Please select to receive email notices and updates from MLSC. You may unsubscribe at any time.

Created time \*

mm/dd/yyyy	hh:mm pm	EDT
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Submit

Never submit passwords through this form. [Report malicious form](#)