



Martinez Tax Service
Tax Consultants

TAX FILING CHECKLIST

New Clients

- Completely fill out our New Client sheet ([link](#))
- Deduction List ([link](#))
- Bring in: ID, social security cards for yourself & spouse
- Dependents? Must bring:
 - Social security cards
 - Child care info – Tax ID #, Name, Address, Phone Number
 - Proof of support – school records, medical records, or letter with child's name and address (address must match yours).
- Copy of last year's tax return

Returning Clients

- Bring all income for tax year – W2s, 1099s, Unemployment
- Additional tax forms: 1098T (tuition form), Childcare info, 1099R (Retirement), Proof of Health Insurance
- Adding new dependents? We need Social Security card & Birth Certificate
- For all dependents/EIC – must provide proof of support – school records, medical records, or letter with child's name and address (address must match yours).
- Direct Deposit Bank info – New account? Or verify if same account as last year.