

Thomas Martinez Tax Services1

We want to welcome you to your friendly tax partner in Houston Texas, where we offer free tax return quotes and provide a no-pressure tax filing experience. We only file your taxes when you feel completely ready, putting your comfort and control first every step of the way. Please complete the information sheet and email it back to me so we can provide you with your quote.

Client Intake Checklist (Gig Workers, Truck Drivers, Military)

Basic Information

- Full legal name (The name on your Social Security Card)
- Date of birth
- Social Security Number
- Current address
- Phone & email
- Filing status (Single, MFJ, MFS, HOH, Qualifying Widow)
- Dependents (names, DOB, SSNs)

Identity Verification

- Driver's license or state ID
- Military ID (if applicable)

Income Documents

For Everyone

- W-2s
- 1099-INT, 1099-DIV, 1099-R
- Marketplace 1095-A (if applicable)

Gig Workers (Uber, DoorDash, Instacart, Freelancers)

- 1099-NEC or 1099-K
- Mileage log OR total miles driven
- Vehicle expenses (gas, repairs, insurance)
- Phone bill percentage used for work
- Equipment purchases (bags, phones, chargers, etc.)
- Home office expenses (if applicable)

Truck Drivers

- 1099-NEC or company settlement statements
- Per diem records (or days away from home)
- Logbook or ELD summaries
- Fuel receipts
- Truck lease payments
- Maintenance/repair receipts
- Insurance
- Tolls, scales, parking
- Personal protective equipment (PPE)

Military

- LES (Leave & Earnings Statement)
- PCS orders
- State of legal residency
- Combat zone pay documentation
- BAH/BAS info
- Tuition assistance or GI Bill documents
- Childcare expenses on base/off base

Deductions & Credits Documentation

- Childcare expenses
- Education expenses (1098-T)
- Student loan interest (1098-E)
- Medical expenses
- Charitable donations
- Retirement contributions
- Estimated tax payments

Final Items

- Bank name with routing & account number for refund
- Last year's tax return
- Signed questionnaire

I certify that the information provided on this form is true and correct, all information has been provided by me and that it is provided with free will. I understand that the IRS can/may audit me at any time and will require proof of any information provided. I understand that I am responsible to provide all paperwork needed

Taxpayer Print Name _____ **Date** _____ **Taxpayer Signature** _____