

# New Client Form

*Martinez Tax & Bookkeeping*  
 1057 Saratoga Avenue  
 Grover Beach, CA 93433  
 Phone: 805-481-2501  
 Fax: 805-994-0400  
 Email: [martineztax2501@gmail.com](mailto:martineztax2501@gmail.com)

Personal Information				
File Status (Circle One):    Single                      Married                      Married Filing Separate                      Head of Household				
Name:		Name:		
SSN:		SSN:		
DOB:		DOB:		
Occupation:		Occupation:		
Address:				
City:		State:	Zip code:	
Phone:		Phone:		
Bank Information (For Direct Deposit)				
Name of Bank:		Checking	Savings	(Circle One)
Routing Number:				
Account Number:				
If you're getting a refund, would you like (Circle One):		If you owe, would you like it to pay by (Circle One):		
Direct Deposit	Check (To address on file)	Bank Account	Check	Online (Through IRS.gov)
Dependents (If new please bring their Social Security Card)				
Name	SSN	DOB	Relationship to Taxpayer	College Student (Y/N)