

# Dependents

Taxpayer Name: \_\_\_\_\_ Last 4 SSN: \_\_\_\_\_

List ALL Dependents to be listed on Tax Return	Number of months lived in your home	Complete this section if NEW		
		Social Security Number	Date of Birth	Relationship
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

*By signing this form you agree with questions answered below and on Form 8867. A copy of the Form 8867 will be provided to you with the tax return.*

\_\_\_\_\_  
Date

\_\_\_\_\_  
Taxpayer Signature

## Documentation Examples *(list not all-inclusive)*

### Residency of a Qualifying Child

- \*School records or statement
- \*Landlord or property management statement
- \*Health care provider statement
- \*Medical records
- \*Child care provider records
- \*Placement agency statement
- \*Social service records or statement
- \*Place of worship statement
- \*Indian tribal official statement

### Disability of Qualifying Child

- \*Medical doctor's statement
- \*Other health care provider's statement
- \*Social services agency or program statement.

### Schedule C

- \* Business license
- \*Form 1099
- \*Records of gross receipts
- \*Summary of income and expenses
- \*Records of expenses.
- \*Bank statements to show income & expenses.

# Dependents

Earned Income Credit (EIC)  
 American Opportunity Credit (AOC)  
 Child Tax Credit (CTC)

Additional Child Tax Credit (ACTC)  
 Credit for Other Dependents (ODC)  
 Head of Household (HOH)

	EIC	AOC	CTC ACTC ODC	HOH
Can you provide documentation, if required, to substantiate your eligibility for each credit and/or HOH filing status and the amount of each credit being claimed? See examples	YES NO	YES NO	YES NO	YES NO
	EIC	AOC	CTC ACTC ODC	
Were any of these credits disallowed or reduced in prior year?	YES NO	YES NO	YES NO	
			CTC ACTC ODC	
Is each qualifying person for whom you are claiming the Child Tax Credit, Additional Child Tax Credit, and Credit for Other Dependents a citizen, national, or resident of the United States?			YES NO	
Did all children for whom you are claiming the Child Tax Credit and/or Additional Child Tax Credit reside with you for more than half the year?			YES NO	
Is there an active Form 8332, Release/Revocation of Claim to Exemption for Child by Custodial Parent, or a similar statement in place?			YES NO	
Did you release the claim for exemption to another person?			YES NO	
		AOC		
Have you provided documentation for the American Opportunity Credit, including Form 1098-T and/or receipts for qualified tuition and related expenses?		YES NO		
				HOH
Were you unmarried or considered unmarried on the last day of the tax year and provided more than half of the cost of keeping up a home for the year for a qualifying person?				YES NO