

QUESTIONNAIRE FOR CLIENTS WITH DEPENDENT CHILDREN

REQUIRED IF YOU HAVE DEPENDENT CHILDREN

You must complete this questionnaire for the children that you are claiming as dependents on your tax return.

The IRS has regulations in its efforts to verify Dependent Credits, Education Credits and Head of Household Filing Status. Tax preparers are responsible for exercising "DUE DILIGENCE" in preparing such returns. Failure to make sufficient inquiries subjects a tax preparer to a \$510 fine for each credit. Therefore, I will need the following information from you in order to claim these credits.

General Question:

How many people live with you? _____ How many: Adults _____ Children _____

Are expenses shared by anyone besides yourself and your spouse? Yes No
(groceries, rent, utilities, insurance, etc.) If yes, please explain _____

COLLEGE CREDITS:

How was tuition paid? ☐ Grants/Scholarships ☐ Loans ☐ Cash/Credit Card ☐ 529 College Savings

What amount did you pay out of pocket (or from loans) for tuition? _____

Books and other qualified expenses? _____

You must provide Form 1098T along with a payment history from the school in order to claim the education credit.

Your Marital Status on December 31, 2022: Circle One Married Single

Divorced/Separated:

Are you the custodial parent? _____

If not, you must have Form 8332 signed by the custodial parent in order to claim the dependent.

Why is the custodial parent not claiming child? _____

Child #1

Name: _____

Date of Birth: _____

This child's relationship to you: _____

How many months during 2022 did child live with you? _____

What documents can you provide, if requested, to prove your dependents are related to you, live in your home & are supported by you:

___ Birth Certificate

___ Adoption Records/Court Placement

___ School, medical, daycare records

Did you receive any financial assistance for the child? Yes No

If yes, what type: _____

Can anyone else claim this child as a dependent? Yes No

Child is a student (circle one): Preschool Elementary

High School College

Child #2

Name: _____

Date of Birth: _____

This child's relationship to you: _____

How many months during 2022 did child live with you? _____

What documents can you provide, if requested, to prove your dependents are related to you, live in your home & are supported by you:

___ Birth Certificate

___ Adoption Records/Court Placement

___ School, medical, daycare records

Did you receive any financial assistance for the child? Yes No

If yes, what type: _____

Can anyone else claim this child as a dependent? Yes No

Child is a student (circle one): Preschool Elementary

High School College

Under penalties of perjury I have answered the above questions correctly to the best of my knowledge.

Signature

Date

Child #3

Name: _____

Date of Birth: _____

This child's relationship to you: _____

How many months during 2022 did child live with you? _____

What documents can you provide, if requested, to prove your dependents are related to you, live in your home & are supported by you:

___ Birth Certificate

___ Adoption Records/Court Placement

___ School, medical, daycare records

Did you receive any financial assistance for the child? Yes No

If yes, what type: _____

Can anyone else claim this child as a dependent? Yes No

Child is a student (circle one): Preschool Elementary
High School College

Child #4

Name: _____

Date of Birth: _____

This child's relationship to you: _____

How many months during 2022 did child live with you? _____

What documents can you provide, if requested, to prove your dependents are related to you, live in your home & are supported by you:

___ Birth Certificate

___ Adoption Records/Court Placement

___ School, medical, daycare records

Did you receive any financial assistance for the child? Yes No

If yes, what type: _____

Can anyone else claim this child as a dependent? Yes No

Child is a student (circle one): Preschool Elementary
High School College