

Dependents & Household

Use when a client wants to claim a child or another person.

Client name:

Tax year:

01 | Your household

List everyone who lived with you during the tax year: names, relationships, ages, and dates in the home.

02 | Person to review

For each potential dependent, give their name, birth date, relationship to you, and whether married. Do not enter SSNs.

03 | Where they lived

For each person: nights with you, nights elsewhere, dates, addresses/caregivers, and temporary absences such as school or medical care.

04 | Education and disability facts

Was anyone a full-time student? Which school and months? Any disability facts relevant to dependent eligibility? Describe only what is needed.

05 | Income and support

What income did each person receive? Who paid their housing, food, clothing, school, medical, and other support costs? Include their own contributions.

06 | Other possible claimants

Who else could claim each person? What is their relationship? Has a return claiming this person already been filed, as far as you know?

Answer every item. Write None or Not sure when needed. Add a page for extra people/assets.

Save and reopen to check answers. Return only through your own preparer's secure portal.

This questionnaire is not an e-file authorization, tax election, or determination of eligibility.

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07 | Your marital circumstances

What was your marital status at year-end? Dates of marriage/divorce/separation? Have you represented yourselves as married without a ceremony?

08 | Home costs

Give annual rent, mortgage interest, property tax, utilities, repairs, home insurance, and food at home. Who paid each amount?

09 | Other help with costs

List support from a partner, relatives, assistance programs, or other sources. Include who received the help and what it paid for.

10 | Special circumstances

Any adoption, foster placement, death, birth, residency abroad, citizenship/residency questions, custody arrangement, or signed Form 8332?

11 | Supporting records

What school, childcare, medical, lease, custody, or support records can you provide? Upload documents only to your preparer's secure portal.

12 | Questions and missing facts

What is uncertain or missing? Your preparer will determine filing status, dependency, and credit eligibility after reviewing the facts.