

Separated Parents & Shared Custody

Use when parents live apart or another parent may claim a child.

Client name:

Tax year:

01 | Parents and child

List child name, birth date, parents' names, relationships, and the tax year. Do not enter SSNs.

02 | Marital and living arrangements

Were the parents married, divorced, separated, or unmarried? Give relevant dates and periods they lived together or apart.

03 | Nights with each parent

Count actual nights during the tax year with each parent. Explain temporary absences and any nights with other caregivers.

04 | Changes during the year

Describe moves, a new baby, school stays, medical stays, military absence, or other events affecting where the child lived.

05 | Other people in the home

Who else lived with the child? Could a grandparent, partner, sibling, or another person claim them? Give relationships.

06 | Support contributions

Who paid the child's living costs? List amounts and sources when available, including each parent and the child.

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07 | Custody and divorce documents

Is there a custody order, decree, or agreement? Give its date and relevant pages available. Do not assume the order alone establishes federal tax eligibility.

08 | Form 8332 or other release

Has a parent signed Form 8332, a release, or a revocation? Which child and tax year(s)? Provide the actual document for review.

09 | Prior or current claims

Who claimed the child last year? Has anyone already claimed them this year? Any rejected return, IRS letter, or dispute?

10 | Childcare and education

Who paid care or tuition? Any dependent-care employer benefits, scholarships, or education forms? Provide records securely.

11 | Residency evidence

List calendars, school/medical records, childcare records, or other records that document nights and residence.

12 | What you want reviewed

Describe your questions. Different dependent-related tax benefits can have different requirements; the preparer must review each separately.

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.