

2023 DEPENDENT QUESTIONNAIRE

Primary Taxpayer: _____ Secondary Taxpayer: _____

Y **N**

Dependent Name: _____

DOB: _____ SSN: _____ (if not already in my records)

Months lived in your home or temporarily away in college in 2023:

This is a dependent of: Primary Taxpayer Secondary Taxpayer BOTH

Relationship to taxpayer(s): _____

Did you pay for childcare or dependent care for this dependent? If yes, name, address, and identification number of providers (EIN or SSN), and amount paid for this dependent. Please note that BOTH the primary and secondary taxpayer must have earned income to qualify. _____

Is this dependent a student (the IRS defines student as full time for any part of FIVE months of the calendar year)?

Is this dependent permanently disabled? If so, please keep documentation by a physician or social security with your tax records.

Did this dependent have any income? (If yes, please include details. I also prepare dependent tax returns at a discount to coordinate dependency on both tax returns.)

Did this dependent have income OVER \$4,700? If yes, did the dependent provide over 50% of their own support during the year?

Have you ever been disallowed a tax credit for a dependent (Earned Income Tax Credit, American Opportunity Tax Credit, Child Tax Credit, Other Dependent Credit)?

If requested by the IRS could you prove the dependent's residence with records from school, medical, daycare or place of worship? Could you prove your relationship to the dependent?

Is custody OR tax exemption shared with another taxpayer? If yes, continue questions below. If no, please continue to signature(s).

Do you alternate years with another parent for tax exemption purposes? If yes, do you claim this dependent odd or even years?

If custody is shared, the IRS considers the custodial parent to be the parent who the dependent lived at least HALF the year with (down to the day.) Are you the custodial parent or the non-custodial parent under this definition?

Please note, if you are the "custodial" parent and it is not your year to claim this dependent you must SIGN a Form 8332 releasing the exemption to the other parent. If you are the "non-custodial" parent, you must RECEIVE a signed Form 8332 from the other parent to claim the dependent.

To the best of my (our) knowledge the information above is accurate for this dependent in 2023.

Primary Signature: _____ Secondary Signature: _____