

Tax Credit Form

EARNED INCOME/ CHILD OR OTHER DEPENDENT TAX CREDIT
QUESTIONNAIRE

1. Did any child listed as your dependent NOT live in YOUR household for more than half of the year?
Yes ___ No ___ If yes, do you have Form 8332 signed by the child's custodial parent giving you permission to claim that child? Yes ___ No ___
2. Did every dependent you listed over the age of 16 live in your household for the whole year?
Yes ___ No ___ N/A ___

If no, did they live in your household for more than half the year? Yes ___ No ___
3. If requested, can you provide documentation to substantiate that your dependent(s) live in your household? Yes ___ No ___
4. Have you ever been denied Earned Income Credit, Child Tax Credit or Education Credit OR have any of these credits been reduced by the IRS in prior years? Yes ___ No ___

HEAD OF HOUSEHOLD QUESTIONNAIRE

1. Marital Status as of December 31st (check ONLY one)

___ NOT married

___ Still Legally Married, **lived apart from spouse for at least the last 6 months of tax year**
Could you provide documentation to substantiate your status? Yes ___ No ___

___ Divorced
2. You must be able to prove you provided **MORE THAN HALF** the cost of maintaining the household of your child(ren) or other dependent(s). Please check all items that apply as proof:

___ Rent receipts or mortgage statement
___ Utilities/Phone Bills
___ Insurance documents/Property tax bills/Home maintenance
___ Grocery receipts
___ Any other household bills _____
3. Is anyone else providing income to the household? Yes ___ No ___ If so, who _____

I have disclosed the above information to Markowitz and Associates, Ltd for the preparation of my 2024 income tax return. I further submit that this information is correct to the best of my knowledge.

Signature _____

Date _____

Printed name _____