**Annual Child/Dependant Questionnaire**

**Tax Year ­­­\_\_\_\_\_\_\_\_\_\_ Client Names \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** **Date \_\_\_\_\_\_\_\_\_\_\_\_\_ Time \_\_\_\_\_\_\_\_\_\_\_\_\_ Drop Off / Interview**

***List ALL Members of your Household – Regardless of whether you claim them or not:***

***Taxpayer & Spouse do NOT need to be listed.***

**PROOF OF RESIDENCY WILL BE REQUIRED FOR ALL DEPENDENTS**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Name, Last Name**  **(if different)** | **Social Security Number** | **Relationship** | **Months**  **In Home** | **Support More than 50%** | **Birthdate** |
|  |  |  |  | Yes / No |  |
|  |  |  |  | Yes / No |  |
|  |  |  |  | Yes / No |  |
|  |  |  |  | Yes / No |  |
|  |  |  |  | Yes / No |  |
|  |  |  |  | Yes / No |  |
|  |  |  |  | Yes / No |  |
|  |  |  |  | Yes / No |  |

If you are divorced or separated with child(ren), do you have a divorce or separation agreement?

**Form 8332 will be required for Non-custodial parents.**

**Dependent Information**

Were there any changes in dependents from last year? Yes / No

If yes, explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you have any children under age 19 (or a full-time student under age 24) with unearned income

(Investment income) in excess of $1,900? Yes / No

Please Explain

Do you have dependents who must file a tax return? Yes / No If yes would you like us to prepare it? Yes / No *We are happy to file dependent tax returns for a reduced fee. Please ask.*

**Earned Income Tax Credit: Yes / No / Maybe**

Third Party Documentation Required – List Documentation

Are any of the dependents a college student? Yes / No

Do you need to file a federal FAFSA form? Yes / No

*We will help file FAFSA forms at a cost of $35 per student.*

Were any children born or adopted in 2020? Yes / No

Did you have Earned Income Credit in 2020? Yes / No

Did you pay any tuition for a private school for a dependent or take classes yourself? Yes / No

Did you pay for any college or post secondary education? **Form 1098-T** Yes / No

Did you pay for child or dependent care so you could work or go to school? Yes / No

Student Name:

Amount Paid:

School Name or EIN:

Do you have any children who earned more than $2,200 of investment income? Yes / No

Did you make any contributions to a 529 plan in 2020? Yes / No