| 2024 Head of Household Questionnaire | |
|---|---|
| Client Name: | Drop Off / Interview |

**If you believe you qualify for Head of Household (HOH) filing status, you must complete this questionnaire.**

**1. Marital Status (as of December 31, 2024) - Check ONLY one.**

| | |
|---|---|
| | **Never Married** |
| | **Divorced -** If the IRS requested it, could you provide a divorce decree? |
| | **Legally Separated -** If the IRS requested it, could you provide a Separation Agreement? |
| | **Spouse Deceased -** If the IRS requested it, could you provide a Death Certificate? |
| | **Still Legally Married - <u>BUT spouse did not live with me at any time during the last 6 months of the year.</u>** |
| | **To prove your spouse did not live with you at any time during the last 6 months of the year; Could you provide to IRS, if requested, with any of the following? (Check all that apply)** |

| | | | | |
|---|---|---|---|---|
| | | **Lease Agreement/ Mortgage Statement in your name** | | **Letter(s) from Clergy, family, neighbors, friends, ect.** |
| | | **Utility Bills in your name** | | **Letter(s) from social services or another governmental agency** |
| | **Any other support documents, if so, what?** | | | |

**2. Name of Qualifying Dependent(s) and Relationship**

| | Name | Relationship | |
|---|---|---|---|
| | | | |
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| | | | |

**Note: If the dependent is not related to you, you do not qualify for Head of Household Filing Status**

**3.** You must be able to prove you provide **<u>MORE THAN HALF</u>** the cost of maintaining the home of your child or relative. Child support, SNAP, and other third-party dollars do not count as support. (Check all items that you have that will provide proof if the iRS should request them.)

| | | |
|---|---|---|
| | **Rent receipts/ Mortgage Statement** | **Monthly amount:** |
| | **Insurance Documents** | **Amount: Mthly / Qtrly** |
| | **Utilities/Phone Bills** | **Monthly amount:** |
| | **Grocery Receipts** | **Monthly amount:** |
| | **Property Tax Bills** | **Amount:** |
| | **Home Maintenance and Repair Bills** | **Amount:** |
| | **Any other household bills:** | |

**4. Is anyone else providing income to the household?**

| | |
|---|---|
| | **If yes, who and how much?** |

**5. Has someone in our office gone over form 886-H-HOH with you?**

**I have disclosed the above information to my income tax professional for them to prepare my 2024 income tax returns. I further submit that this information is correct to the best of my knowledge.**

| | | |
|---|---|---|
| **Signature:**Type name as signature. | **Date:**_____ | **Reviewed by:** _____ |

Preparer Notes: