

# Head of Household Questionnaire

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

1. Marital Status (as of December 31, 2021) – Check ONLY one.

- Never Married
- Still Legally Married, **but spouse did not live with me at any time during the last 6 months of the year.**

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 or Mortgage Statement in Your Name
  - Utility Bills in Your Name
  - Letter(s) from Clergy, family, neighbors, friends, etc
  - Letter(s) from social services or another governmental agency
  - Any other supporting documents, if so, what \_\_\_\_\_
- Divorced - If IRS requested it, could you provide a divorce decree Yes  No
- Legally Separated - If IRS requested it, could you provide a Separation Agreement Yes  No
- Spouse Deceased - If IRS requested it, could you provide a Death Certificate Yes  No

2. Name of Qualifying Dependent(s): \_\_\_\_\_ Relationship: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**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 provided **MORE THAN HALF** the cost of maintaining the home of your child or relative. (Check all items that you have that will provide proof if IRS should request them.)

- Rent Receipts or 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 Yes No If so, who \_\_\_\_\_

**I have disclosed the above information to my income tax professional for them to prepare my 2021 income tax returns. I further submit that this information is correct to the best of my knowledge.**

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **Reviewed By:** \_\_\_\_\_