

# J-tax-S Inc.

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## Dependent Worksheet

Dependent Information: must provide proof each year for each dependent...We will either need School Records, Driver License, Daycare Paperwork, Social Security paperwork, 1095B from State, or Doctor Records, (these documents must be for tax year and state the name and address of each dependent)

Birth Certificate for each dependent may be requested

Name: _____	Name: _____	Name: _____
SS#: _____	SS#: _____	SS#: _____
DOB: _____	DOB: _____	DOB: _____
Relationship: _____	Relationship: _____	Relationship: _____
# of months lived with you for the year: _____	# of months lived with you for the year: _____	# of months lived with you for the year: _____

Have you ever been notified by the IRS that the Earned Income Tax Credit or Child Tax Credit claimed on a return filed by you was denied or reduced?

YES  NO

Did another resident in the home earn more than you?

YES  NO

Did anyone else contribute to the support of the child or adult dependent? (Child support, social security, etc)

YES  NO

Did the child live with the taxpayer for more than half of 2023?

YES  NO

If no, is there an active Form 8332 – Release/Revocation of Exemption to Claim Child by Custodial Parent, or similar document, in place which states who can claim any of the children listed above? If yes, you must provide a copy to us.

YES  NO

Is there a written custody, divorce or separation agreement or court order regarding the child? We may ask you to provide a copy to us.

YES  NO

If the child is not your biological child, are/were you ever married to the child's mother/father?

YES  NO

If the biological parents are not living with the child, where are the parents?

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Did you have any daycare or preschool expenses? (if yes, Provide statement)

YES  NO

Do you have a Dependent Care account or FSA account for Childcare expenses?

YES  NO

For Adopted Children,

Did you have any adoption expenses?

YES  NO

Did you adopt a child that was special needs?

YES  NO

Is the adoption pending or final? \_\_\_\_\_

For Foster Children,

Do you have a letter from an authorized placement agency or applicable court document?

YES  NO

When claiming a Brother, sister, niece, nephew, grandchildren, great-grandchildren, stepchildren or descendant of them, step-grandchildren, step-great-grandchildren, half-sister, half-brother:

Can you provide a **Birth Certificate** that verifies your relationship to the child?

YES  NO

Must provide any of the following to prove that your child lived with you in the United States for more than half of the year (more than one type may be required by IRS)

School Records  Medical Records  
 Social Service records  Daycare Records  
 Daycare provider Info  Letter (must be on letterhead)

Is the child permanently and totally disabled (any age)?

YES  NO

What is the child's disability? \_\_\_\_\_

Does the child receive SSI or other disability payments?

YES  NO

Do you have a letter from the child's doctor, other healthcare provider or any social service program or agency verifying that the child is permanently and totally disabled?

YES  NO

Do you or the taxpayer know of another person who could give similar answers regarding, Relationship, Marital Status, Co-habitation, Age, student, disability status for the child?

YES  NO

Child's Relationship to the other person? \_\_\_\_\_

How many days was the child physically present in the United States, if not a full year? \_\_\_\_\_

Was the other dependent a dependent of any other taxpayer for 2023?

YES  NO

Did the other dependent have a gross income of less than \$4,700 in 2023. This does not include non-taxable income such as welfare benefits, or nontaxable Social Security benefits, or was the person permanently or totally disabled?

YES  NO

Did the taxpayer provide over half of the other dependents support for 2023?

YES  NO

By signing below, I verify that the above information is true and correct.

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date