

2023 Dependent Form

2023 Requirements: Because of all the money involved in claiming children, proof of residency in one of the forms below must be presented to claim dependents this year (our usual pre-COVID policy).

If I had to I could provide for the IRS: ☐ social security card, ☐ birth certificate, ☐ a piece of mail the child has received at my address in 2023, ☐ 2023 school records, ☐ medical records, ☐ a health care provider statement (check all that apply)

Dependent Form: Fill this out **completely**. Your child is your dependent if they are younger than 19 by the end of 12/31 or, in college and younger than 24 (or are disabled and any age). If your dependent files their own tax return they must mark "someone can claim me as a dependent" on it so your return doesn't get rejected by the IRS (paper filing and amending will incur extra tax preparation fees).

(Prior clients list name & # months only)

Name	Social Security # <i>N/A if on file</i>	Date of Birth	Relationship to you	# of months in your home (max. 12)
1				
2				
3				
4				

YES NO: I am the custodial parent, I have the right to claim my dependents and haven't released my claim to anyone. (If "No" don't continue form.)

YES NO: This dependent lived in my home for 183 days or more (if in college he/she spent vacations at home). If they didn't live with you for over half the year the Child Tax Credit may not be claimed.

YES NO: Part of my salary goes into a dependent care account.

YES NO: My main home (and that of my spouse if filing together) was in the U.S. for more than half of the year.

YES NO: The IRS has previously disallowed my child credit or earned income credit. Which year(s)? _____

YES NO: The child on this form is married.

YES NO: He/she is a citizen, national or resident of the U.S.

YES NO: Another person could qualify to claim this child.

YES NO: There is an active Form 8332 Release of Claim to exemption by the custodial parent.

YES NO: This child is not my son or daughter. If yes, why is the parent not claiming them: _____

☐ **Child(ren)** _____ **was/were under the age of 12** by 12/31 of the tax year and I paid for non-educational care (camp, after-school program, pre-school): Spent \$ _____ on childcare for this child while I was working/school full-time: Provider: _____;
SSN/EIN: _____
Address _____



Turn over-signature(s) required.

☐ **Child ____ is in college:** Spent \$ _____ this year on higher education. \$ _____ for the actual classes (Include the 1098-T and Bursar statement from the college with your documents), and \$ _____ for supplies including books, software, etc. The education was: ☐ Undergraduate, ☐ Graduate. ☐ I am planning on taking the American Opportunity Credit (the largest undergraduate credit) and realize I can only take it for 4 years. Use back of sheet if more than one child qualifies.

Head of Household: If you're single or "married living separately from a spouse" for the last 6 months and 1 day of the year and have a dependent please answer: I am: ☐ not married, ☐ married, but lived apart from my spouse for the last 6 months and 1 day (i.e. by move out by June 29th) of the year, I could provide the IRS with these items if asked: ☐ divorce decree, ☐ separate maintenance or separation agreement, ☐ mortgage statement, ☐ property tax bill, ☐ lease agreement, ☐ utility bills, ☐ grocery receipts, ☐ other household bills.

YES/NO: I receive non-taxable support: ☐ food stamps, ☐ housing assistance, ☐ childcare assistance ☐ Medicaid

Taxpayer Signature

Date

Spouse Signature

Date

Additional Info: