



Dependency Questionnaire

1. Could you or your spouse, if married filing jointly, be a dependent of any other person?

Yes No

2. Are you claiming a dependent?

Yes No

a. What is the dependent's name: _____
(exactly as it appears on the dependent's social security card)

b. What is the dependent's date of birth: _____

c. What is the dependent's age as of December 31, 2023? _____

d. What is your relationship with the dependent? Please check one (1):

Son Daughter Stepchild Eligible Foster Child (court directed) Other Relationship
or No Relationship

Please note: Other relationships may include: brother, sister, step-relations, half-relations, aunt, uncle, niece, nephew, parent, grandparent, and/or grandchild

e. If the dependent is YOUR child, check one (1):

Under 19 19-24 and a full-time student; in school at least 5 months

Any age and totally and permanently disabled; with written proof of disability

f. If the dependent is NOT your child, you must explain why the child's own parents are not claiming him/her:

g. Did the dependent live with you, in your household for the entire year (full 12 months)?

Yes No

h. Did the dependent live with you for more than six months / 183 nights in 2023?

Yes No

i. If “YES” do you have written proof with “your” address as the “child’s” address that proves the child lived with you, such as school records, medical records, childcare records, etc?

Yes No

i. Can any other person claim the child lived with them more than 6 months or 183 nights?

Yes No

j. Is the dependent a citizen or national of the United States?

Yes No

k. Is the dependent married?

Yes No

i. If “YES”, is he/she filing a joint return with his/her spouse?

Yes No

l. Did the dependent earn more than \$12,550 in 2023, not including Social Security or investments?

Yes No

m. Did the dependent receive any financial assistance? Check ALL:

Child support Food Stamps Medicare Medicaid WIC

Housing / Utility Assistance Daycare Benefits Help from Family Other

Social Security Benefits

If dependent received Social Security benefits, how much? \$ _____

n. Who paid for the dependent’s support?

I paid more than the dependent. The dependent paid more than I paid.

You must be able to prove you paid more for the dependent’s support than the total income received by the dependent. “Support” means living expenses such as food, clothing, housing, health, education, recreation, transportation, etc.

o. If you file as Single or Head of Household, does anyone in your household earn more money than you do?

Yes No

i. If "YES", what is the higher income person's relationship to the dependent?

p. Are you wanting to use this dependent for Head of Household purposes only?

Yes No

I have disclosed the above information to my income tax preparer to prepare my 2023 tax return and I further submit that this information is correct to the best of my knowledge and I can produce records if requested.

Signature: _____ Date: _____

Reviewed by: _____

ⁱ The IRS requires that you fill out this form for each dependent.