

J-tax-S Inc.

2909 South Queen Street, Dallastown, PA 17313
Office: (717) 246-3398 www.j-tax-s.com

Dependent Worksheet

These forms will be a yearly occurrence so that we can reverify your information and keep our records up to date. Thank you for taking the time to complete these documents so we can continue to serve our clients while staying in compliance with the IRS.

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

In accordance with IRS standards and policies, J-tax-S, Inc. now requires everyone to complete the following document before we can begin to process your tax return. If we do not ask these questions and stay in compliance, we can personally be fined \$530 per child/per credit.

| | | |
|-----------------------------------|-----------------------------------|-----------------------------------|
| Name: _____ | Name: _____ | Name: _____ |
| SS#: _____ | SS#: _____ | SS#: _____ |
| DOB: _____ | DOB: _____ | DOB: _____ |
| Relationship: _____ | Relationship: _____ | Relationship: _____ |
| # of months lived with you: _____ | # of months lived with you: _____ | # of months lived with you: _____ |

List the names and relationship of everyone who lived in your home last year if not listed above.

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 or your spouse?

YES NO

Did anyone else contribute to the support of the child or adult dependent? (ie. Child support, insurance)

YES NO

Did the child live with the taxpayer for more than half of 2019?

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

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

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

YES NO

Adopted Children,

Did you have any adoption expenses?

YES NO

Is the adoption pending or final? _____

Foster Children,

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

YES NO

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 not a dependent of any other taxpayer for 2019?

YES NO

Did the other dependent have a gross income of less than \$4,150 in 2019. 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 2019?

YES NO

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Head of Household (we must have some of the below items to show proof you are maintaining the home, ex. Lease Agreement, Utility bills, Property Tax Bills, Letter from Social Services, Mortgage Interest, Rent Receipts)

Unmarried (or considered unmarried) and provided more than half the cost of keeping up a home for the year for a qualifying person

Marital Status

- Never married Widow/Widower (spouse died before 01/01/2019)
 Received final decree/separation agreement by 12/31/2019
 Married but lived apart last 6 months (can provide proof, Lease agreement, Utility bills, etc.)

Check next to any of the following you can provide to the IRS in order to substantiate maintaining more than half the cost of the home for being Married but living apart for the last 6 months of the year

- Utility Bills Property tax bills Rent receipts or mortgage interest
 Other household bills Letter from social services Grocery receipts

Check next to any of the following to indicate any non-taxable support or income you received

- Family support Housing assistance Food Stamps
 Childcare Assistance Other _____

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

Taxpayer Signature

Date

Spouse Signature

Date