

Dear Taxpayer,

Due to the increasing due diligence requirements placed on tax preparers when it comes to preparing returns for taxpayers claiming certain deductions and/or tax credits which pertain to our children, I have developed this brief questionnaire. To be sure I calculate your return accurately and to provide you with all available tax benefits please take a few minutes to complete and return to me promptly.

First list all your minor children whether they lived with you or with someone else such as a parent, grandparent, or a divorced spouse. Also list adult children who may live with you if permanently and totally disabled at any time.

	<u>Childs name (First and last)</u>	<u>Soc.Sec. #</u>	<u>Age at 12/31/17</u>	<u>How many months lived with you in 2017?enter 0-12 (12 if full time)</u>
1	_____	_____	_____	_____
2	_____	_____	_____	_____
3	_____	_____	_____	_____
4	_____	_____	_____	_____

If more than 4 list on separate page

NOTE-A child must be under age 19 or under age 24 if a full time student at least 5 mos. of the year

Did any of the above children provide more than half of his/her own support in 2017? _____

Are any of the above children married and filing a joint return? _____

Have you reported all your income this year to me? ____ If uncertain please ask.

Does the taxpayer or spouse if you are filing jointly qualify to be a dependent of anyone else? _____

Do you pay for day care expenses? _____ If so please complete my "Tax Data Questionnaire" Note-You must be the child's custodial parent to claim child or dependent care expenses. You don't have to claim dependent to be entitled.

Have any tax credits been disallowed by the IRS in a previous year? (Yes) (No)

If asked, can you provide documentation(proof) such as medical, school, or religious records that you are eligible to claim this child? This would include a divorce decree. (Yes) (No)

If any of the above are children of divorced parents please answer the following. These questions must be answered separately for each child listed above:

- A. Is there a written divorce decree in place that provides you as either the custodial parent or as the non-custodial parent a right to claim a tax exemption for the child this year? _____ If no agreement the parent who the child spends most time with can usually claim the dependent. If equal time the parent with the highest income may claim assuming they provide over half the support.
- B. If you are the non-custodial parent you may claim a child as a dependent if your decree states you may or you have a written declaration from the custodial parent that says you may. Does this apply to you? _____

Important Note:

Just because one parent is entitled to dependency deduction custodial parent still qualifies for other benefits such as The Head of Household filing status and earned income tax credit. To claim the child tax credit or child and dependent care credit you must be able to take an exemption for the child in the given tax year.