

(Please Print Clearly)

TAX YEAR 2023

[Empty box]

Name \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_

Spouse \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_

Address \_\_\_\_\_ Apt # \_\_\_\_\_

City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

E - Mail \_\_\_\_\_

**FILING STATUS** - Only check one box. If you're unsure, leave blank and we'll contact you.

- Single
- Head of Household\*\*
- Married / Joint
- Married / Separately

\*\* If filing as Head of Household, would you be able to provide proof that you are unmarried and provide more than half the cost of keeping up a home for a qualifying person if requested by the IRS? YES  NO

**OTHER REQUIRED INFORMATION**

1. Were you or anyone on your tax return covered through the Marketplace or Exchange (ObamaCare) in 2023?..... YES  NO
2. Are you currently in default on a student loan, child support, or owe back taxes to the IRS or the State Tax Commission? ..... YES  NO
3. Did the taxpayer have any interest or authority over any foreign account or trust in 2023? ..... YES  NO
4. At anytime during 2023, did the taxpayer receive, dispose, exchange, or gift any digital assets? ..... YES  NO

**EDUCATION CREDIT- College Students only**

Student's Name \_\_\_\_\_

1. Are you or any of your dependents enrolled in college full time and received a 1098-T form from the school? ..... YES  NO
2. Has the Hope Scholarship Credit or American Opportunity Tax Credit (AOTC) been claimed for this student for a total of 4 times during any prior years? ..... YES  NO   
How many years the education credit (AOTC) has been taken? \_\_\_\_\_
3. Was the student enrolled at least half-time for at least one academic period that began in 2023 at an eligible education institution in a program leading toward a college degree, certificate, or other recognized postsecondary educational credential? ..... YES  NO
4. Did the student complete the first 4 years of college education before 2023? ..... YES  NO
5. Was the student convicted before the end of 2023 of a felony for possession or distribution of a controlled substance? ..... YES  NO

**FOR OFFICE USE ONLY - DO NOT WRITE BELOW THIS LINE.**

AOTC (Alt - O) \$ \_\_\_\_\_ LLC (Alt - L) \$ \_\_\_\_\_

Did the student receive Form 1098-T from the institution for 2023 .....YES  NO

Did the student receive Form 1098-T from the institution for 2022 with box 2 filled in and box 7 checked? .....YES  NO

Mother's Maiden Name \_\_\_\_\_

**DEPENDENTS - IF CLAIMING DEPENDENTS FILL OUT THE FOLLOWING SECTIONS**

1. First \_\_\_\_\_ Last \_\_\_\_\_ SSN \_\_\_\_\_  
DOB \_\_\_\_\_ The dependent's relationship to you \_\_\_\_\_  
Amount of daycare paid by you \_\_\_\_\_ Number of months in 2023 this child lived with you \_\_\_\_\_  
Is this your biological child? \_\_\_\_\_ Could another person **qualify** to claim this child? \_\_\_\_\_  
If yes, their name and relationship to the child \_\_\_\_\_  
Please check the following boxes for documents you **would** be able to provide to show that the dependent lives in the home with you if the IRS were to ask?  
 School Records                       Medical Records                       Daycare Records                       Letter\*  
 Social Services (DHS)                       Landlord Statement                       Employer Statement

2. First \_\_\_\_\_ Last \_\_\_\_\_ SSN \_\_\_\_\_  
DOB \_\_\_\_\_ The dependent's relationship to you \_\_\_\_\_  
Amount of daycare paid by you \_\_\_\_\_ Number of months in 2023 this child lived with you \_\_\_\_\_  
Is this your biological child? \_\_\_\_\_ Could another person **qualify** to claim this child? \_\_\_\_\_  
If yes, their name and relationship to the child \_\_\_\_\_  
Please check the following boxes for documents you **would** be able to provide to show that the dependent lives in the home with you if the IRS were to ask?  
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 Social Services (DHS)                       Landlord Statement                       Employer Statement

3. First \_\_\_\_\_ Last \_\_\_\_\_ SSN \_\_\_\_\_  
DOB \_\_\_\_\_ The dependent's relationship to you \_\_\_\_\_  
Amount of daycare paid by you \_\_\_\_\_ Number of months in 2023 this child lived with you \_\_\_\_\_  
Is this your biological child? \_\_\_\_\_ Could another person **qualify** to claim this child? \_\_\_\_\_  
If yes, their name and relationship to the child \_\_\_\_\_  
Please check the following boxes for documents you **would** be able to provide to show that the dependent lives in the home with you if the IRS were to ask?  
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 Social Services (DHS)                       Landlord Statement                       Employer Statement

4. First \_\_\_\_\_ Last \_\_\_\_\_ SSN \_\_\_\_\_  
DOB \_\_\_\_\_ The dependent's relationship to you \_\_\_\_\_  
Amount of daycare paid by you \_\_\_\_\_ Number of months in 2023 this child lived with you \_\_\_\_\_  
Is this your biological child? \_\_\_\_\_ Could another person **qualify** to claim this child? \_\_\_\_\_  
If yes, their name and relationship to the child \_\_\_\_\_  
Please check the following boxes for documents you **would** be able to provide to show that the dependent lives in the home with you if the IRS were to ask?  
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 Social Services (DHS)                       Landlord Statement                       Employer Statement

\*The letter must be on official letterhead from one of the following: school, medical provider, social service agency, place of worship, or other acceptable entity (not from the parent of the child).

**RELATIONSHIP**

**COMPLETE ONLY IF THE RELATIONSHIP IS NOT YOUR BIOLOGICAL CHILD.**

- 1. FOSTER CHILDREN:  
Do you have a letter from the authorized placement agency or applicable court documentation that the child is your foster child?.....YES  NO
- 2. BROTHER, SISTER, NIECE, NEPHEW, GRANDCHILD, GREAT-GRANDCHILD:  
Can you provide birth certificates that verifies your blood relationship to the child?.....YES  NO
- 3. STEPCHILDREN OR DESCENDENT OF THEM, STEP-GRANDCHILDREN:  
Can you provide birth certificates & a marriage certificate verifying your relationship to the child?.....YES  NO
- 4. Why aren't the biological parents of the child(ren) not claiming their own child(ren)?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_