

(Please Print Clearly)

TAX YEAR 2022

[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 2022? 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 2022? YES NO
4. At anytime during 2022, 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 2022 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 2022? YES NO
5. Was the student convicted before the end of 2022 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 2022 YES NO

Did the student receive Form 1098-T from the institution for 2021 with box 2 filled in and box 7 checked? YES NO

PREPARER _____ W2'S _____ UP CHARGE ITEMS _____ FED _____

DE _____ VER _____ 1099'S _____ ADDT'L FORMS _____ STATE _____

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 2022 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 2022 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

3. First _____ Last _____ SSN _____
DOB _____ The dependent's relationship to you _____
Amount of daycare paid by you _____ Number of months in 2022 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

4. First _____ Last _____ SSN _____
DOB _____ The dependent's relationship to you _____
Amount of daycare paid by you _____ Number of months in 2022 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

*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)?

