



**Certified Public Accountants**

Please answer the questions below reflecting on the 2022 tax year.

Can you provide documentation to substantiate that you **paid** more than half the cost of keeping a home for the 2022 calendar year (Rent, Mortgage, Utilities, etc.)? YES NO

Were you unmarried and lived with another adult in 2022 (roommate/significant other)? YES NO

Please explain: \_\_\_\_\_

Have you had any changes in children/dependent(s) during the 2022 calendar year? YES NO

Did your children/dependent(s) live in your home in the United States with you for **more** than 6 months of the 2022 calendar year? YES NO

If no, please explain: \_\_\_\_\_

Who provides the majority of the support for your children/dependent(s)?

\_\_\_\_\_

Is there anyone else that you have agreed to share tax benefits with, or that would be eligible to claim tax benefits for your children/dependents? YES NO

If yes, please explain: \_\_\_\_\_

I/(we) can provide the following documentation to substantiate the tax credit(s) claimed on the tax return in the event of an audit(check all that apply):

\_\_\_\_ School Records      \_\_\_\_ Daycare Records      \_\_\_\_ 3<sup>rd</sup> Party Verification Stmt.

\_\_\_\_ Medical Records      \_\_\_\_ Social Services Records      \_\_\_\_ Other \_\_\_\_\_

Has the IRS ever disallowed or reduced the Earned Income Credit, Child Tax Credit, Additional Child Tax Credit or American Opportunity Tax Credit on a prior tax return? YES NO

Additional information obtained during client interview (if applicable):

\_\_\_\_\_

I(We) certify that the above answers are true and correct to the best of my(our) knowledge.

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Date

\_\_\_\_\_  
Preparer

\_\_\_\_\_  
Date