



# TAX CREDIT WORKSHEET

## ALL TAXPAYERS

- Yes  No Have you ever had a tax credit reduced or disallowed in any prior tax year?
- Yes  No Were you and your dependents (*if applicable*) present in the United States for more than 1/2 the year?
- Yes  No Can you provide documentation to substantiate your eligibility and the amount of credit(s) claimed on the return?

## TAXPAYERS WITH DEPENDENTS

- Yes  No Are any of your dependents married?
- Yes  No Did any of your dependents earn more than \$4,400?
- Yes  No Are your dependents US Citizens?
- Yes  No Did your children live with you for more than 1/2 of the year? (*If not your children, then they must have lived with you the entire year.*)
- Yes  No Are you the only legal or custodial parent(s) of the children? (*If no, IRS form 8332 is required*)
- Yes  No Do you have school, daycare, or medical records for each child showing your name, their name, and your address for last year?

What school and/or daycare did your children attend: \_\_\_\_\_

## HEAD OF HOUSEHOLD

What was your marital status on December 31<sup>st</sup>:

- Never Married  Divorced, decree issued \_\_\_\_\_  Legally Separated on \_\_\_\_\_  Widow / Widower  Married

- Yes  No Did you pay more than 1/2 the cost of maintaining your home?
- Yes  No Are the utilities and mortgage / lease in your name?
- Yes  No Is your income sufficient to support yourself and your children?
- Yes  No Do you provide more than 1/2 of the financial support for your children?
- Yes  No Does anyone not listed on this return live in your household?
- Yes  No Does anyone living with you have higher income than you?

Where does the other parent for the children live:  In your home  Same City  Unknown  Other: \_\_\_\_\_

Do you receive any of the following non-taxable support:  Family Support  Food Stamps  Housing Assistance  Childcare Assistance

## STUDENTS AND TAXPAYERS WITH STUDENTS

What type of school did the student attend:  College / University  Vocational / Trade School  Military Academy  Private K-12

- Yes  No Did you receive a 1098-T for the student?
- Yes  No Did you receive a 1099-Q or take any withdraws from education accounts? *i.e. 529 Plans*
- Yes  No Was the student enrolled at least 1/2 time for at least one semester?
- Yes  No Was the student enrolled in a program that leads to a degree, certificate, or credential?
- Yes  No Did you pay for tuition, fees, or books with unreimbursed funds?
- Yes  No Do you have documentation / receipts for the payments you made and what they were for?
- Yes  No Was a refund received for any class that was cancelled or dropped?
- Yes  No Did the student already have a bachelor's degree prior to this tax year?
- Yes  No Has student claimed the American Opportunity Tax Credit 4 or more times before?
- Yes  No Has the student ever been convicted of a drug felony?

## CLAIMING THESE CREDITS IN ERROR CAN HAVE LASTING IMPACT

You are responsible for the accuracy of the information provided. Claiming credits with incomplete or inaccurate information could significantly delay your refund. In the event of an IRS review, representation is available (*with a retainer*) and is billed at our current hourly rate. If the IRS denies any of your credits you will be responsible for returning any amount paid in error plus penalties and interest. If the error is deemed to be fraud or reckless / intentional disregard of the rules the IRS could prevent you from ever claiming these credits again. By signing below you affirm you have provided complete and accurate information for the credits you are claiming.

SIGNATURE \_\_\_\_\_ PRINTED NAME \_\_\_\_\_ DATE \_\_\_\_\_

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