

## 2020 Tax Credit Supporting Information (TY 2019)

### Earned Income Credit

- Filing Status:  
Single  Married Filing Jointly  Married Filing Separately  Head of Household
- Taxpayer full-year citizen or resident? Yes  No
- Spouse full-year citizen or resident? Yes  No
- Taxpayer's Relationship to any claimed children \_\_\_\_\_
- Spouse's Relationship to any claimed children \_\_\_\_\_
- Were the claimed children living in the United States for more than 6 months of the year?  
Yes  No  Comments \_\_\_\_\_
- Did or will any of the claimed children file a joint tax return with their spouse? Yes  No   
If yes, was this tax return filed because the child did not have a separate filing requirement and **only** to claim a refund? Yes  No
- Is anyone else claiming these children for EIC? Who? \_\_\_\_\_

### Child Tax Credit and Additional Child Tax Credit (skip this if no children)

- Did the claimed children live with the taxpayer for over one-half of the year?  
Yes  No  Comments \_\_\_\_\_
- Did you release the claim for exemption to another person?  
Yes  No  To whom? \_\_\_\_\_
- Is there an active Form 8332 or a similar statement in place? Yes  No   
If yes, provide a copy of the Form 8332.

### Other Dependents Credit (skip if no other dependents to claim)

- Qualifying person is your dependent? Yes  No
- Qualifying person is a citizen, national, or resident of the USA? Yes  No
- Qualifying person's gross income (must be less than \$4,300) \$ \_\_\_\_\_

### Education Expenses

- Is the taxpayer claiming the student as a dependent? Yes  No
- If yes, please provide the following documents:
  - Form 1098-T  Tuition & Fees Receipts/Statement
  - Books & Supplies Receipts  Room and Board Receipts
  - Equipment Receipts (computers and software, etc.)

**Head of Household (skip if not filing Head of Household)**

- Was the taxpayer unmarried or considered unmarried on the last day of the tax year?  
Yes  No  Comments \_\_\_\_\_
  - Did the claimed children live with the taxpayer for over one-half of the year?  
Yes  No  Comments \_\_\_\_\_
  - Taxpayer's Relationship to children \_\_\_\_\_
  - Claimed children's income \$ \_\_\_\_\_
  - Qualifying relative's gross income (must be less than \$4,300) \$ \_\_\_\_\_
  - Please provide the following supporting documentation regarding household costs:  

<u>Amounts you paid:</u>	<u>Total cost:</u>
<input type="checkbox"/> Property taxes	<input type="checkbox"/> Property taxes
<input type="checkbox"/> Mortgage interest	<input type="checkbox"/> Mortgage interest
<input type="checkbox"/> Rent	<input type="checkbox"/> Rent
<input type="checkbox"/> Utilities	<input type="checkbox"/> Utilities
<input type="checkbox"/> Repairs & maintenance	<input type="checkbox"/> Repairs & maintenance
<input type="checkbox"/> Property insurance	<input type="checkbox"/> Property insurance
<input type="checkbox"/> Food eaten in the home	<input type="checkbox"/> Food eaten in the home
<input type="checkbox"/> Other household expenses	<input type="checkbox"/> Other household expenses
- 

Were any of the above tax credits reduced or disallowed in a prior year? Yes  No

If yes, when? \_\_\_\_\_

Interviewer Signature: \_\_\_\_\_

Taxpayer signature and date: \_\_\_\_\_