

Earned Income Credit Checklist **YOUR NAME** _____

All Taxpayers (circle YES or NO below for each question)

Is your filing status married filing separately?	YES	NO
Do you have a social security number?	YES	NO
Does your spouse (if filing jointly) have a social security number?	YES	NO
Do you (or your spouse) have income from a foreign source?	YES	NO
Did you (or your spouse) live in another country for any part of 2015?	YES	NO
Do you have investment income more than \$3400?	YES	NO
Are you a qualifying child of another person for 2015?	YES	NO
HAVE YOU BEEN PREVIOUSLY DENIED EARNED INCOME TAX CREDIT?	YES	NO

Taxpayers With a Child (circle YES or NO, fill in the blanks)

	Child 1	Child 2	Child 3
Child's name	_____	_____	_____
*Is the child your son, daughter, stepchild, foster child, brother, sister, stepbrother, stepsister, half brother, half sister, or a descendant of any of them?	YES NO	YES NO	YES NO
*Was the child unmarried at the end of 2015?	YES NO	YES NO	YES NO
*Did the child live with you for over half of 2015?	YES NO	YES NO	YES NO
*Is the child under age 19 and younger than you (or your spouse)?	YES NO	YES NO	YES NO
*Is the child under age 24, a full-time student, and younger than the taxpayer (or your spouse)?	YES NO	YES NO	YES NO
*Is the child permanently and totally disabled?	YES NO	YES NO	YES NO
Do you know of another person who could answer yes on starred questions above?	YES NO	YES NO	YES NO
*If so, what is the child's relationship to that person.	_____	_____	_____

Under the tiebreaker rules, your Earned Income Credit and other tax benefits may be disallowed

If the child is NOT your son or daughter, why are the parents **not** claiming the child? _____

Which document(s) could you provide to prove residency of Qualifying Child(ren): (check items below)

	Child 1	Child 2	Child 3
School records			
Landlord statement			
Health care provider statement			
Medical records			
Child care provider records			
Social service records			
Placement agency records (foster child)			
Place of worship statement			
Employer statement			
Other (specify)			

Taxpayers Without a Qualifying Child (circle YES or NO below for each question)

Was your main home in the US for more than half the year? Spouse?	YES NO	YES NO
Are you (or your spouse) at least age 25 but under 65 at the end of 2015?	YES	NO
Are you eligible to be claimed as a dependent on anyone else's federal income tax return for 2015?	YES	NO

Signature _____

Date _____

HEAD OF HOUSEHOLD Status Only
Earned Income Credit Checklist

1 Marital status:

- Never married
- Spouse deceased
- Divorced or separated
- Married but lived apart from spouse during the last 6 months of the year
- Separation agreement

2 If you are divorced or legally separated, can you provide the IRS with any of the following documents?

- Divorce decree
- Separate maintenance agreement or separation agreement

3 If you are married but did not reside with your spouse for the last 6 months of the tax year, can you provide the IRS with any of the supporting documents verifying that your spouse did not live with you?

- Not applicable
- Lease agreement
- Utility bills
- Letter for a clergy member
- Letter from social services
- Other supporting documentation:

4 Can you provide the IRS with receipts and bills substantiating the cost of maintaining more than half of the cost of the home? Documentation that the IRS requires to substantiate the cost of maintaining the home includes:

- Utility bills
- Property tax bills
- Grocery receipts
- Rent receipts or mortgage interest statement
- Maintenance and repair bills
- Other household bills

5 Did you receive any non-taxable support/income?

- Family support
- Food stamps
- Housing assistance
- Childcare assistance
- Other:

Signature Date