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Tax Year
2018

Intake/Interview Questionnaire

Tax Credits

Part IV – Tax Credits

Yes	No	Child Tax Credit/Additional Child Tax Credit
<input type="checkbox"/>	<input type="checkbox"/>	Did the child live with you for more than half of 2018?
<input type="checkbox"/>	<input type="checkbox"/>	Is the child your son or daughter?
<input type="checkbox"/>	<input type="checkbox"/>	Can anyone else claim the child as their dependent?
<input type="checkbox"/>	<input type="checkbox"/>	Have you permitted someone else to claim this child for 2018? If someone else permitted you to claim the child, please attach form 8332.
<input type="checkbox"/>	<input type="checkbox"/>	Did the child provide over half of his or her own support?
<input type="checkbox"/>	<input type="checkbox"/>	Can you be claimed as a dependent on someone else federal tax return?

Yes	No	American Opportunity Tax Credit
<input type="checkbox"/>	<input type="checkbox"/>	Please provided us with a copy of your 1098-T? We require a copy of this form.
<input type="checkbox"/>	<input type="checkbox"/>	Did you or the dependent student pay any qualified educational expenses?
<input type="checkbox"/>	<input type="checkbox"/>	Were any of the educational expenses shown on the 1098-T reimbursed to you through a scholarship, grant, VA benefit or employer assistance? If yes, how much: _____.
<input type="checkbox"/>	<input type="checkbox"/>	If the student withdrew from classes, did they receive a refund of educational expenses?
<input type="checkbox"/>	<input type="checkbox"/>	Has the student or parents claimed the American Opportunity Tax Credit in a prior tax year? If yes, how many years: _____.

Yes	No	Earned Income Tax Credit (EITC - Income Limit \$54,844)
<input type="checkbox"/>	<input type="checkbox"/>	Are you claiming head of household? If yes, please check the following: <input type="checkbox"/> Never Married <input type="checkbox"/> Divorced/Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Married, but lived apart for 6 months If separated or divorced , do you have documentation to support claiming HOH (divorce decree or separation agreement)? Yes <input type="checkbox"/> No <input type="checkbox"/> If, married but living apart for 6 months , check the box next to any of the following to verify your living arrangements (you do not need to provide us with this document)? <input type="checkbox"/> Lease agreement <input type="checkbox"/> Letter from social services <input type="checkbox"/> Utility bills <input type="checkbox"/> Other (write in): _____.
<input type="checkbox"/>	<input type="checkbox"/>	Do you receive any non-taxable support or income? If yes, please check the following: <input type="checkbox"/> Family support <input type="checkbox"/> Housing assistance <input type="checkbox"/> Food stamps <input type="checkbox"/> Childcare assistance <input type="checkbox"/> Other (write in): _____.
<input type="checkbox"/>	<input type="checkbox"/>	Are you self-employed? If yes, answer the following questions: Do you maintain separate bank accounts (personal & business)? Yes <input type="checkbox"/> No <input type="checkbox"/> Do you have any 1099-Misc forms to support your income? Yes <input type="checkbox"/> No <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Do you have documentation to show that your child lived with you for more than half the year (school records, medical records, or daycare record)?
<input type="checkbox"/>	<input type="checkbox"/>	Was your primary residence in the United States for more than half the year?

Yes	No	All Must Answer
<input type="checkbox"/>	<input type="checkbox"/>	Were any of these credits disallowed or reduced in a prior year?

Taxpayer Signature: _____

Date: _____