Head of Household Questionnaire

1. Marital status: (check ONLY one)

☐ Never married

☐ Still Legally Married, **but spouse did not live with me at any time during the last 6 months of the year**

To prove your spouse did not live with you at any time during the last 6 months of the year;
Could you provide IRS, if requested, with any of the following? (check all that apply)

☐ Lease agreement in your name (or mortgage statement in your name)

☐ Utility bills in your name

☐ Letter(s) from clergy, family, neighbors, friends, etc.

☐ Letter(s) from social services or other governmental agency

☐ Any other supporting documentation, if so, what_____

☐ Divorced If IRS requested it, could you provide them with your Divorce decree . . . . . ☐ **Yes** ☐ **No**

☐ Legally Separated If IRS requested it, could you provide them with your Separation Agreement . . ☐ **Yes** ☐ **No**

☐ Spouse Deceased If IRS requested it, could you provide them with a Death Certificate . . . . . ☐ **Yes** ☐ **No**

2. Name of qualifying dependent (s) _____ **Relationship** _____
_____ **Relationship** _____
_____ **Relationship**_____

Note: If the dependent is not related to you, you do not qualify for Head of Household filing status.

3. You must be able to prove you provided *MORE THAN HALF* the cost of maintaining the home of your child or relative? (check all the items you have that will provide that proof, if IRS should request them)

☐ Rent receipts or mortgage statement
☐ Insurance documents
☐ Utilities/Phone bills
☐ Grocery receipts
☐ Property tax bills
☐ Home maintenance and repair bills
☐ Any other household bills _____

4. Is anyone else providing income to the household? ☐ **Yes** ☐ **No** If so, who _____

I have disclosed the above information to my income tax preparer for them to prepare my _____ income tax return and I further submit that this information is correct to the best of my knowledge.

Signature: _____ **Date:** _____ **Reviewed By** _____