

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** _____