

John S. La Tour, CPA
Head of Household Worksheet
(Taxpayers who are single – legally or functionally – with dependents)

Qualifying Person _____ SS# _____

NOTE: The IRS could require additional information/documentation if you are divorced, legally separated, or married and did not reside with your spouse the last six months of the year to determine if you qualify for the head of household filing status

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 re 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 from a clergy member
 - Letter from social services
 - Other supporting documentation. If so, what type of 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 _____

Under penalties of perjury, I, the undersigned taxpayer, declare and affirm that I have provided the answers to and/or supplied documentation to obtain the answers to the above questions. The above answers, whether supplied or derived during my tax preparer's interview are true, correct, and complete. Furthermore, I, the undersigned, understand and acknowledge that the IRS is randomly reviewing returns that apply for earned income credit. I understand and acknowledge that this IRS review might delay, reduce or preclude my refund. I agree that so long as John La Tour, CPA has acted in a fair and reasonable manner that I will not hold it liable for delays caused by the IRS or its review process.

Signature of Taxpayer Date

Signature of Spouse (if filing jointly) Date