

## EARNED INCOME CREDIT

### Head of Household Must Complete This Section: Marital Status:

- Never Married**                       **Spouse Deceased**                       **Divorced or Separated**  
 **Separation Agreement**       **Married but lived apart from Spouse for the last 6 months of the year**

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

- Divorce Decree**                       **Separation Agreement or Separate Maintenance Agreement**

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**                       **Letter from Clergy**  
 **Utility Bills**                       **Letter from Social Services**  
 **Other Supporting Documentation, If so What Type of Documentation?** \_\_\_\_\_

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

- Utility Bills**                       **Rent/Mortgage Interest Statement**       **Grocery Receipts**  
 **Property tax Bills**                       **Maintenance and Repair Bills**       **Other Household Bills**

Did you receive and non-taxable support/income?

- Family Support**                       **Food Stamps**  
 **Housing Assistance**                       **Childcare Assistance Other**

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### Self-Employed Must Complete This Section:

How long have you been in business? \_\_\_\_\_

Can you provide any documentation to substantiate your business?

- Business Cards**                       **Receipts or Receipt Book (with company header)**  
 **Business Stationery**                       **Business/Occupational License (if required)**  
 **Other Tax Returns (sale/excise employment, etc...)**  
 **Advertisements (newspaper, flyer, yellow pages, etc...)**

**Other** \_\_\_\_\_

Who maintains the business records? \_\_\_\_\_

Do you maintain separate banking accounts for personal and business transactions? **Yes No**

If Yes, in what form were the records provided? \_\_\_\_\_

If No, how do you differentiate between personal and business transactions and monetary assets?  
\_\_\_\_\_

What type of records are you providing the tax preparer to prepare your tax returns?

- Accounting Records**                       **Paid Invoices/receipts**                       **Log Books**  
 **Computer Records**                       **Ledgers**                       **Car/Truck Expenses**  
 **Business Bank Accounts Other** \_\_\_\_\_

Did you receive a 1099-MISC to support your Income? **Yes No**