

Questionnaire—Filing Status, Exemptions, and Standard Deduction

Section I. Taxpayer Data

| | | |
|---|------------------------------------|--------------------|
| 1. Name(s) and address (exactly as shown on your income tax return) | 2. Social Security Number | 3. Tax Form Number |
| | 4. Spouse's Social Security Number | 5. Tax Year Ending |

Section II. Filing Status and Standard Deduction

Please check the appropriate box and answer the corresponding question(s) to show how you intended to file your tax return.

1. ☐ **Single**
2. ☐ **Married filing joint return**
3. ☐ **Married filing separate return**
 - a. Did your spouse file a tax return for the tax year in Section I above? ☐ Yes ☐ No ☐ Unknown
 - b. Please enter your spouse's Social Security Number in Section I above and print your spouse's name here as it appeared on that return _____
 - c. Did you and your spouse live together at any time during the last 6 months of the year? ☐ Yes ☐ No
4. ☐ **Head of Household (with qualifying dependent)**
(During the tax year, you provided more than half the cost of maintaining a household for a qualifying dependent.)
 - a. If the qualifying person is your child, but is being claimed by the other parent, enter this child's name here: _____
 - b. At the end of the tax year in Section I, above, you were:

| | | | |
|---|----------------------------------|--|---|
| <input type="checkbox"/> Unmarried | <input type="checkbox"/> Widowed | <input type="checkbox"/> Legally Separated | <input type="checkbox"/> Married to a Nonresident Alien |
| <input type="checkbox"/> You claimed your married child, grandchild, great-grandchild, etc., to include stepchild or adopted child who qualifies as your dependent. | | | |
| <input type="checkbox"/> You claimed your married child, grandchild, great-grandchild, etc., adopted child, or stepchild who is not claimed as a dependent, due to your divorce or separation from the other parent who is claiming the child as a dependent. | | | |
| <input type="checkbox"/> You claimed your foster child who is qualified as your dependent. | | | |
| <input type="checkbox"/> You claimed any other relative who is qualified as your dependent. | | | |
 - c. The household mentioned in Item 4a, above, was:

| |
|--|
| <input type="checkbox"/> Your household. |
| <input type="checkbox"/> The home you maintained for your parent who can be claimed as your dependent. |
 - d. Did you and your spouse live together at any time during the last 6 months of the tax year? ☐ Yes ☐ No
5. ☐ **Qualifying widow(er) with dependent child** ► What year did your spouse die? _____

Section III. Exemptions for Dependents and Standard Deduction

Please give complete information below for each person you claimed as a dependent on your return for the tax year shown in Section 1. The names and Social Security Numbers you provide below must be written as they appear on the Social Security Card(s) issued by the Social Security Administration. If you need additional space or have made changes to any of these items, please use the back of this form to continue and/or explain your entries.

| 1. First and Last Name | 2. Social Security Number | 3. Dependent's Relationship to You | 4. Check box if dependent qualifies for Child Tax Credit |
|------------------------|---------------------------|------------------------------------|--|
| | | | <input type="checkbox"/> |
| | | | <input type="checkbox"/> |
| | | | <input type="checkbox"/> |
| | | | <input type="checkbox"/> |

5. Were you 65 or over at the end of the tax year shown in Section I, above? ☐ Yes ☐ No
6. Were you blind at the end of the tax year? ☐ Yes ☐ No
7. Was your spouse 65 or older at the end of the tax year? ☐ Yes ☐ No
8. Was your spouse blind at the end of the tax year? ☐ Yes ☐ No
9. Did you intend to claim an exemption for your spouse? ☐ Yes ☐ No
10. Did your spouse have any gross income for the tax year? ☐ Yes ☐ No
11. Can you be claimed as a dependent on another person's return for the tax year? ☐ Yes ☐ No
12. Can your spouse be claimed as a dependent on another person's return for the tax year? ☐ Yes ☐ No

| | | | |
|---|--|--------------------|------|
| Sign here (if filing jointly, both must sign) | Under penalties of perjury, I declare that I have examined this statement and to the best of my knowledge and belief, it is true, correct, and complete. | | |
| | Your Signature | Spouse's Signature | Date |