

CONNIE'S ACCOUNTING SERVICE, INC
DEPENDENT CREDIT QUESTIONNAIRE

Child/Children's Name(s): _____

Please provide documents to verify that you are eligible for these tax credits.*

This form is to review the eligibility of the following credits: CTC (Child Tax Credit) – ACTC (Additional Child Tax Credit) –
EITC (Earned Income Tax Credit) – AOTC (American Opportunity Tax Credit (College))

Taxpayer questions to Claim a Dependent:	YES	NO
• Are you a US Citizen?	_____	_____
• Were you a nonresident alien for any part of 2023?	_____	_____
• Could you be a qualifying child of another person for 2023?	_____	_____
• Was your main home in the US for more than half the year?	_____	_____
• Can anyone else claim you as a dependent for 2023?	_____	_____

Dependent Credit Information for a Qualifying Child or Relative:

• Do you have your dependent(s) birth certificate?	_____	_____
• Do you have your dependent(s) Social Security or ITIN cards?	_____	_____
• Is your dependent a son, daughter, stepchild, foster child, brother, sister, or grandchild?	_____	_____
• Did your dependent(s) reside with you at least 184 days/nights? (half year) .	_____	_____
• Could another person qualify to claim your dependents?	_____	_____
• Have you released your dependent claim to another person?	_____	_____
• Do you have documents to prove that each child lived with you for more than half the year?	_____	_____
• Are your dependents US Citizens?	_____	_____
• Do any of your dependents have a permanent and total disability?	_____	_____
• Did any of your dependents provide over half of their own support for 2023?	_____	_____
• Did you pay over half of the cost of keeping up the home and support?	_____	_____

ONLY Answer the questions below for the American Opportunity Tax Credit:

• Did you or your dependents receive any employer-provided Educational assistance?	_____	_____
• Was the student enrolled at least ½ year or 1 academic period in 2023? . . .	_____	_____
• Did the student complete the first 4 years of college before 2023?	_____	_____
• Was the student convicted of a felony for possession or distribution of a controlled substance before the end of 2023?	_____	_____
• Do you have Form 1098T and receipts for tuition and related expenses? . . .	_____	_____
• Has the AOTC college credit been claimed for this student been claimed for a total of 4 times in prior years?	_____	_____
• How many years has the student claimed this credit? _____ Years		

*Documents provided: _____

Signature of Parent/Legal Guardian: _____ Date: _____