



## Tax Preparation Checklist with Dependents

### 1. Personal & Dependent Information

- Taxpayer's full legal name, SSN, and filing status
- Full name, SSN/ITIN, and date of birth for each dependent
- Relationship to the dependent (child, stepchild, foster child, relative, etc.)
- Proof of residency (school records, medical records, or other documents showing shared address)
- Custodial parent status (if divorced or separated)
- Signed IRS Form 8332 (if required for non-custodial parent claiming the dependent)

### 2. Income Documentation

- W-2 forms (for taxpayer and spouse, if applicable)
- 1099 forms (if applicable)
- Dependent's income (W-2s, 1099-NEC/MISC, investment income if applicable)
- Scholarships and grants (if dependent is in college)

### 3. Child Tax Credits & Deductions

- **Child Tax Credit (CTC)** (for dependents under 17)
- **Additional Child Tax Credit (ACTC)** (if eligible for refund)
- **Credit for Other Dependents** (for dependents over 17 or qualifying relatives)
- **Earned Income Tax Credit (EITC)** (if income qualifies)
- **Child and Dependent Care Credit** (if paying for daycare, babysitters, or after-school care)

### 4. Education-Related Tax Benefits

- **Form 1098-T (Tuition Statement)** (if dependent is in college)
- **Qualified education expenses** (books, supplies, tuition, fees)
- **529 plan contributions & withdrawals**
- **American Opportunity Credit (AOTC) or Lifetime Learning Credit (LLC)** eligibility

### 5. Health Insurance & Medical Expenses

- **Form 1095-A, 1095-B, or 1095-C** (proof of health insurance coverage)
- **Medical and dental expenses for dependents** (if itemizing deductions)
- **Dependent care FSA or HSA contributions**
- **Disability-related expenses (if applicable)**

### 6. Other Dependents & Special Considerations

- Adoption tax credit (if applicable)
- Foster care payments or assistance received
- Child support payments (note: not deductible but may impact filing)
- Dependent's savings bond interest (if cashed)
- Special needs expenses or tax benefits for disabled dependents

### 7. Other Tax Considerations

- Dependent's investment income (check Kiddie Tax rules)
- Household employee tax (nanny, caregiver) if applicable
- Taxpayer's contributions to dependent's savings or trust funds
- Any additional tax credits or deductions available for families

## **Final Steps**

- Verify all personal and financial details for accuracy
- Confirm eligibility for tax credits and deductions
- Gather all necessary receipts and documentation
- Call Fast Tax Central (334) 458-1000 to schedule your tax preparation appointment