**THE TAX EXPERTS**

**OF**

**THE Essix Group**

**2536 Mangum Street**

**Commerce, Texas 75428**

**EIC, CTC/ATC/ODC, AOTC & HOH Documentation**

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ , do attest under penalties of perjury, and to the best of my knowledge, that the information written on the EIC, CTC/ATC/ODC, AOTC & HOH documentation sheet has not changed and is true and accurate.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Taxpayer’s Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Essix Group Representative Date

**DO NOT WRITE BELOW THIS LINE (For Essix Group Staff Only)**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client Interviewed? **YES or NO** Date of interview \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

By \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Were applicable EIC and/or CTC/ACTC/ODC, AOTC or HOH worksheets completed? **YES or NO**

Were applicable EIC and/or CTC/ACTC/ODC, AOTC or HOH worksheets printed? **YES or NO**

Were records of how, when, and from whom the information used documented? **YES or NO**

Has it been determined that the taxpayer was unmarried or considered

unmarried on the last day of the tax year and provided more than half of the

cost of keeping up a home for the year for a qualifying person? **YES or NO**

To meet knowledge requirements, were adequate questions asked and

responses documented that determine the Taxpayer’s eligibility to claim the credit(s)? **YES or NO**

Make Notes below

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