

# Other Dependent Credit Questionnaire

**Client Name:**

**Tax Year:**

**The Other Dependent Credit (ODC) is a \$500 credit per dependent ages 17 and over.**

1. What is the name, date of birth, and relationship of the person you are claiming as a dependent for the above tax year?
2. Have any tax credits been disallowed in previous years by the IRS?
3. How many months did the dependent live with you during the year? (includes living at college)
4. Did you provide over 50% of their support during the year?
5. Is the dependent a US Citizen, national, or resident of the USA?
6. Was the dependent a full-time student for at least 6 full months during the tax year listed above?  
  
If yes, what school did they attend?
7. Does this dependent qualify to be claimed by any other person for the tax year listed above?
8. Was the dependent's gross income less than \$5,200? (You may exclude nontaxable income such as Social Security Benefits or welfare benefits)

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9. If you own your own business (as reported on Schedule C of your personal tax return, please answer the following questions:

How long have you had your business or received 1099-Misc income?

Who maintains the business records?

Do you maintain separate bank accounts for personal and business transactions?

If no, how do you differentiate personal and business transactions?

10. If you answered yes to question 7 above, please sign here that you received a copy of the Tie Breaker Rules

**Name**

**Date**