

# Earned Income Tax Credit Worksheet for Tax Year 2020

## For All Taxpayers:

1. Were you a nonresident alien for any part of the year?    **YES**    **NO**
2. Could you, or your spouse if filing jointly, be a qualifying child of another person for the year?  
    **YES**    **NO**

## Taxpayers with Self-Employment Income

1. How long have you owned your business? \_\_\_\_\_
2. Can you provide any documentation to substantiate your business? Examples would be business cards, business stationery, Receipts or receipt book (with company header) etc.    **YES**    **NO**
3. Who maintains the business records? \_\_\_\_\_
4. Do you maintain separate banking accounts for personal and business transactions?    **YES**  
    **NO**
5. If "Yes" in what form were the records provided? \_\_\_\_\_
6. If "No" how do you differentiate between personal and business transactions and monetary assets? \_\_\_\_\_
7. Were satisfactory records of income and expenses provided?    **YES**    **NO**
8. If "Yes" in what form were these records provided? \_\_\_\_\_
9. If "No" how did you determine the amount of income? The amount of expense?
10. Did you receive any Forms 1099-MISC to support income?    **YES**    **NO**
11. If not, is it reasonable that the business type would not receive Form 1099-MISC?    **YES**    **NO**

12. Are the expenses consistent with the type of business? **YES** **NO**

13. Are any expenses that are typical for this type of business missing? **YES** **NO**

### **Information on Taxpayers Eligible Children**

1. Is either of the following true? The child is unmarried, OR the child is married, can be claimed as the taxpayers dependent, and is not filing a joint return (except to claim a refund)? **YES** **NO**

2. Did the child live with the taxpayer in the U.S. for more than half of the year? **YES** **NO**

3. Could another person qualify to claim this child? **YES** **NO**

4. Answer ONLY if 3 is YES: Child's relationship to other person? SON DAUGHTER OTHER

5. Answer ONLY if 3 is YES: If the tiebreaker rules apply, would the child be treated as the taxpayer's qualifying child? **YES** **NO**

6. Which documents below, if any, can you use to prove that the qualifying child lived with you more than 6 months of the year last year?

- Medical Records
- Child care provider records
- Social services records or statement
- School records or statement
- Health care provider statement
- Other? Please explain: \_\_\_\_\_

### **For Taxpayers who have Filing Status - Head of Household**

1. What is your Marital Status?

2. If you are divorced or legally separated, can you provide the IRS with any of the following documents?

- Divorce Decree
- Separate maintenance agreement or separation agreement?

3. If you are married but did not reside with your spouse for the last 6 months of the tax year, can you provide the IRS with any of the supporting documents verifying that your spouse did not live with you?

N/A

Lease Agreement

Utility Bills

Letter from a clergy member

Letter from Social Services

Other supporting documentation

4. Can you provide the IRS with receipts and bills substantiating the cost of maintaining more than half of the cost of the home? Documentation that the IRS requires to substantiate the cost of maintaining the home includes:

- Utility Bills
- Grocery receipts
- Property Tax Bills
- Maintenance and repair Bills
- Rent receipts or mortgage interest statement

5. Did you receive any non-taxable support/income?      **YES**      **NO**

**For Taxpayers with a Qualifying Child Over the Age of 18**

Have you or will you be providing documentation that proves the child's residency so that the taxpayer has documented evidence that the child is truly a qualifying child in reference to the Earned Income Credit?

**By signing below you acknowledge that all of the above information is 100% accurate to the best of your knowledge and that you take full responsibility on any data provided on this form. Also note that we will not e-file your tax return while claiming the Earned Income Credit without this information filled out and signed.**

**Taxpayer Please Type:**

**Date:**

**Spouse Please Sign:**

**Date:**