

Head of Household Additional Information

Name(s) as shown on return _____

Filing Status - Head of Household

The IRS could require additional information/documentation if you are divorced, legally separated, or married and did not reside with your spouse the last 6 months of the year to determine if you qualify for the head of household filing status.

1. Marital status:

- | | |
|--|---|
| <input type="checkbox"/> Never married | <input type="checkbox"/> Married but lived apart from spouse during the last 6 months of the year |
| <input type="checkbox"/> Spouse deceased | <input type="checkbox"/> Separation agreement |
| <input type="checkbox"/> Divorced | |

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

- 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 **if requested?**

- Not applicable
 Lease agreement
 Utility bills
 Letter for a clergy member
 Letter from social services
 Other supporting documentation

If so, what type of 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 **if requested? Documentation that the IRS requires to substantiate the cost of maintaining the home includes:**

- | | |
|---|---|
| <input type="checkbox"/> Utility bills | <input type="checkbox"/> Rent receipts or mortgage interest statement |
| <input type="checkbox"/> Property tax bills | <input type="checkbox"/> Maintenance and repair bills |
| <input type="checkbox"/> Grocery receipts | <input type="checkbox"/> Other household bills |

5. Did you receive any non-taxable support/income?

- | | |
|---|---|
| <input type="checkbox"/> Family support | <input type="checkbox"/> Childcare assistance |
| <input type="checkbox"/> Food stamps | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Housing assistance | |

6. If anyone else lives in the home: Name _____ Relationship _____
 Do they provide any financial support? Yes No

*** This worksheet can be used to substantiate the costs of maintaining the home.**

Complete ONLY if you are unsure if you paid over 50% of cost of maintaining your home.

| | Amount You Paid | Total Cost |
|---|-----------------|------------------|
| Property taxes | \$ _____ | \$ _____ |
| Mortgage interest expense | | |
| Rent | | |
| Utility charges | | |
| Repairs/Maintenance | | |
| Property insurance | | |
| Food eaten in the home | | |
| Other household expenses | | |
| Totals | \$ _____ | \$ _____ |
| Minus total amount you paid | | (_____) |
| Amount others paid | | \$ _____ |
| If the total amount you paid is more than the amount others paid, you meet the requirement of paying more than half of the cost of keeping up the home. | | |

| | | |
|----------------|------|--|
| Your signature | Date | |
|----------------|------|--|