

David C. Bryant, CPA – 2024 Tax Year – Head of Household Filing Questionnaire

1. Marital Status (check all that apply)

- Never married
- Widow/Widower (spouse died before 1/1/2024)
- Received final decree of divorce, legal separation, dissolution, or termination of marriage by 12/31/2024. Check next to the following you can provide to the IRS:
 - Divorce decree
 - Separation agreement
- Married, but lived apart for the last 6 months of the year.

Check next to any of the following you can provide to the IRS to verify that you lived apart:

- Not applicable
- Letter from clergy member
- Letter from social services
- Lease agreement
- Utility bills
- Other: _____

2. Qualifying Person(s)

a. Did you pay for more than half the cost of keeping up a home that was your home and the main home of your child(ren)?

- Yes
- No

b. Is someone else claiming your child(ren) as a dependent?

- Yes
- No

⇒ If yes, did they spend the night at that person’s home more than half the year?

- Yes
- No

⇒ If yes, please provide the name, social security number, and relationship of that child(ren) to you.

3. Select any of the following items you can provide to the IRS to substantiate maintaining more than half the cost of the home.

- Utility bills
- Grocery receipts
- Property tax bills
- Rent receipts or mortgage interest
- Other household bills

4. Select any of the following to indicate any non-taxable support or income you received.

- Family support
- Housing assistance
- Food stamps
- Childcare assistance
- Other: _____