

***David C. Bryant, CPA – 2025 Tax Year – Head of Household Filing Questionnaire***

**TAXPAYER'S FIRST & LAST NAME:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**1. Marital Status (*check all that apply*)**

- ☐ Never married
- ☐ Widow/Widower (spouse passed away before 01/01/2025)
- ☐ Received final decree of divorce, legal separation, dissolution, or termination of marriage by 12/31/2025. 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 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.

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**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: \_\_\_\_\_