IF YOU ARE MARRIED, PLEASE TELL US ABOUT YOUR SPOUSE:

SPOUSE'S LAST NAME _____ SPOUSE'S FIRST NAME _____ MIDDLE _____

CITIZENSHIP? ◯ US CITIZEN | ◯ GREEN CARD | ◯ EAD/H1/H4/L1/L2 | ◯ OPT/F1/J1/M1

SOCIAL SECURITY NUMBER OR ITIN (XXX XX XXX) _____ - _____ - _____

DATE OF BIRTH (MM DD YYYY) _____ / _____ / _____

NEED TO APPLY FOR ITIN? ◯ YES | ◯ NO

TITLE/OCCUPATION _____

IF YOU HAVE CHILDREN OR SUPPORT DEPENDENTS, YOU MAY ENTER THEIR INFORMATION HERE:

PLEASE TELL US ABOUT YOUR DEPENDENTS HERE:

DEPENDENT'S LAST NAME _____ DEPENDENT'S FIRST NAME _____ MIDDLE _____

CITIZENSHIP? ◯ US CITIZEN | ◯ GREEN CARD | ◯ EAD/H1/H4/L1/L2 | ◯ OPT/F1/J1/M1

SOCIAL SECURITY NUMBER OR ITIN (XXX XX XXX) _____ - _____ - _____

DATE OF BIRTH (MM DD YYYY) _____ / _____ / _____

NEED TO APPLY FOR ITIN? ◯ YES | ◯ NO

RELATION? ◯ SON | ◯ DAUGHTER | ◯ PARENT | ◯ IN-LAW | ◯ OTHER: _____

IF YOU HAVE ADDITIONAL DEPENDENTS, YOU MAY ENTER THEM HERE:

DEPENDENT'S LAST NAME _____ DEPENDENT'S FIRST NAME _____ MIDDLE _____

CITIZENSHIP? ◯ US CITIZEN | ◯ GREEN CARD | ◯ EAD/H1/H4/L1/L2 | ◯ OPT/F1/J1/M1

SOCIAL SECURITY NUMBER OR ITIN (XXX XX XXX) _____ - _____ - _____

DATE OF BIRTH (MM DD YYYY) _____ / _____ / _____

NEED TO APPLY FOR ITIN? ◯ YES | ◯ NO

RELATION? ◯ SON | ◯ DAUGHTER | ◯ PARENT | ◯ IN-LAW | ◯ OTHER: _____

IF YOU HAVE ADDITIONAL DEPENDENTS, YOU MAY ENTER THEM HERE:

DEPENDENT'S LAST NAME _____ DEPENDENT'S FIRST NAME _____ MIDDLE _____

CITIZENSHIP? ◯ US CITIZEN | ◯ GREEN CARD | ◯ EAD/H1/H4/L1/L2 | ◯ OPT/F1/J1/M1

SOCIAL SECURITY NUMBER OR ITIN (XXX XX XXX) _____ - _____ - _____

DATE OF BIRTH (MM DD YYYY) _____ / _____ / _____

NEED TO APPLY FOR ITIN? ◯ YES | ◯ NO

RELATION? ◯ SON | ◯ DAUGHTER | ◯ PARENT | ◯ IN-LAW | ◯ OTHER: _____

IF YOU NEED MORE SPACE, PLEASE FILL OUT ANOTHER SPOUSE / DEPENDENT SHEET

PLEASE NOTE – NEW IRS RULES REQUIRE PROOF OF ID & CARE

FOR ALL TAX RETURNS FILED FOR THE TAX YEAR 2016 AND ONWARDS, THE IRS NOW DEMANDS PROOF OF IDENTITY AND CARE FOR ALL PERSONS CLAIMED AS SPOUSE OR DEPENDENTS ON YOUR TAX RETURN.

THE IRS WILL WITHHOLD OR STOP PAYMENT OF ALL REFUNDS WITHOUT THIS INFORMATION.

OUR OFFICE IS A TRUSTED IRS E-FILE PROVIDER AND CAN PROCESS YOUR TAX RETURN WITH YOUR COOPERATION IN THIS MATTER. PLEASE BE SURE TO SUBMJIT OR UPLOAD SUPPORTING DOCUMENTS WITH YOUR TAX FILING.

WE KINDLY REQUEST AT LEAST 1 ITEM FOR EACH PERSON CLAIMED ON YOUR TAX RETURN AS PROOF:

FORM OF PROOF FOR SPOUSE	PROOF OF CARE OF CHILDREN	PROOF OF CARE FOR PARENT
1. Spouse's Driver License	1. Immunization Records	1. State Issued ID or License
2. Spouse's State ID	2. Report Card (Previous Year)	2. Parent Must Be USC or GC