

# Earned Income Credit and Child Tax Credit Worksheet

for Taxpayers having Qualifying Children

Questions	Yes	No
1. Is the taxpayer's filing status <b>married filing separately</b> (MFS), and they <b>live together for at least last 6 months of the year</b> ?		
2. Does the taxpayer (and the taxpayer's spouse if filing jointly) have a <b>Social Security Number that allows him/ her to work</b> ?		
3. Is the taxpayer filing <b>Form 2555 or excluding foreign income</b> ?		
4. Is the taxpayer (or taxpayer's spouse) a nonresident alien for any part of the 2025 year?		
5. Is the taxpayer's <b>investment income received in 2025 year more than \$11,950.00</b> ?		
6. Could the taxpayer (or the taxpayer's spouse, if filing jointly) be a <b>qualifying child of another person</b> ?		
7. If you took EIC on your previous income tax return, was the <b>EIC reduced or disallowed</b> for any reason other than a math or clerical error? If you did not take EIC on your previously tax return, check "No".		

Qualifying children listed on Schedule EIC	Child 1	Child 2	Child 3		
YES	NO	YES	NO	YES	NO
8. The child's date of birth					
9. The child's relationship to taxpayer					
10. Number of months the child lived with you in the U.S. during 2025 tax year					
110. Is either of the following true? - The child is <b>under age 19</b> at the end of 2025 <b>or</b> - The child is <b>under age 24</b> at the end of 2025 a <b>full-time student</b> , and younger than you (or your spouse) <b>or</b> - The child is a <b>permanently and totally disabled</b> during 2025 at any age					
12. Is either of the following true? - The child is <b>unmarried</b> <b>or</b> - The child is married, and can be claimed as taxpayer's dependent, and is not filing this year joint return (or is filing it only as a claim for refund)					
13. Did the <b>child live with the taxpayer in the U.S. for over half of the year</b> ?					
14a. Does the taxpayer know of <b>another person who can claim</b> the child for EIC? If "Yes", continue.					
14b. Enter the child's relationship with the other person(s)					
14c. Is the other person(s) claiming the EIC based on the child?					
14d. If the tie-breaker rules apply, would the child be treated as taxpayer's qualifying child?					
15. Does the qualifying child have an <b>SSN that allows him/her to work</b> ?					

I hereby acknowledge that Sorsher and Associates will prepare my income tax return solely based on the information I provide, in accordance with the Tax Reform Act of 2025. Under the Safeguarding American Citizenship Act of 2024, fraudulent filings may result in civil, criminal, and immigration penalties, including loss of U.S. citizenship. I accept full responsibility for the accuracy and completeness of such information and release Sorsher and Associates from any liability arising from errors and omissions from incomplete or false data, or future changes in law.

Taxpayer's Name		Signature		Date	
Spouse's Name		Signature		Date	

## GENERAL MISCELLANEOUS QUESTIONS:

Questions	Yes	No
<b>1) Is there anyone else who lived in your home in 2025 tax year?</b>		
If yes, who (relationship to you)?		
Do they have any income to contribute to the household?		
If yes, how much (total amount)?	\$	
<b>2) Did you receive an income tax refund in 2024 year?</b>		
If yes, approximately how much?	\$	
<b>3) List any other sources of cash/ income/ assistance received in 2025 tax year</b>		
If yes, approximately how much?	\$	

### **4) CIRCLE EACH OF THE FOLLOWING THAT YOU RECEIVED IN 2025 YEAR:**

Cash Assistance - DHS/FIP

Cash From Family & Frends

Food Donations

Medicaid - Healthcare

Bank Accounts

Volunteer Help

Bridge Card - Food Assistance

Bills Paid By Others

WIC

Section 8 - Rent Assistance

### **5) ADDITIONAL INFORMATION/ NOTES:** \_\_\_\_\_

#### **TOTAL NUMBER OF DEPENDENTS:** \_\_\_\_\_

Applicable questions and answers have been completed for each dependent

### **6) OTHER PARENT'S NAME (for not claiming/non custodial parent):** \_\_\_\_\_

Mother: \_\_\_\_\_

Father: \_\_\_\_\_

Where is she? \_\_\_\_\_

Where is he? \_\_\_\_\_

Does she provide any assistance?

Does he provide any assistance?

If yes, how much? \$ \_\_\_\_\_

If yes, how much? \$ \_\_\_\_\_

### **HEAD OF HOUSEHOLD (HOH) VS SINGLE:**

IN ORDER TO BE CONSIDERED AS A HEAD OF HOUSEHOLD (HOH) FOR 2025 YEAR, YOU MUST PROVIDE OVER HALF OF THE COST OF KEEPING UP YOUR HOME FOR THE YEAR.

ONLY ONE TAXPAYER PER HOME CAN QUALIFY FOR HOH.

CAN YOU PROVIDE DOCUMENTATION PROVING YOUR HOH STATUS? **Y e s** **N o**  
IF NO, YOUR FILING STATUS IS **SINGLE**.

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