

# The Dependent Disclosure Form

**Rules for Claiming Children:**

When you are claiming a dependent who is a child, there are further requirements:

- The child must have lived with you for at least half of the year.
- The child must be related to you as a son, daughter, stepchild, foster child, brother, sister, stepbrother, stepsister, or a descendant of any of those.
- The child must be 18 or younger at the end of the year, or under 24 if a student. To be a student, the child must have attended school full-time during at least five months of the year. The five months do not have to be in a row.
- The child must be younger than you (or your spouse, if married filing jointly), unless the child is disabled.

**Claiming Other Relatives and/or Unrelated Persons as your Dependent:**

To claim a relative(s) or an unrelative person(s) on your tax return please consult with the tax preparer. The tax preparer will need the following information for each to determine if you could claim the person(s) as your dependent.

- Annual income
- Date of Birth
- Health Status
- The relationship of the person to you.
- If the person lives with you or not

**Please list your Dependents below: (IRS requires a Social Security Number for each dependent.)**

**NO CHANGES FROM PREVIOUS YEAR (Only if we prepared your previous year tax return)**

<u>Name</u>	<u>Date of Birth</u>	<u>Relationship</u>	<u>SS Number</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____

**If any dependent whom you are claiming had income in 2025, please include their Tax Documents.**

I do hereby declare that the above-named children and/or adults are my dependents according to the information described above and may be listed on my tax return as such.

In the absence of the taxpayer's spouse ("Taxpayer #2"), the undersigned taxpayer hereby represents and affirms that Taxpayer #2 has fully cooperated in connection with this disclosure and has knowingly and voluntarily consented to and agreed with the accuracy and completeness of the information set forth herein. Accordingly, the signature of Taxpayer #2 is not required for purposes of this submission. This does not prevent or protect the taxpayer's spouse from Internal Revenue Code 6015, innocent spouse rules.

\_\_\_\_\_  
Signature of Taxpayer #1

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Taxpayer #2

\_\_\_\_\_  
Date

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