

## Head of Household Questionnaire

If you believe you qualify for Head of Household (HOH) filing status, you must complete this questionnaire.

1. Marital Status (as of December 31, 2023) – Check ONLY one.

Never Married

Still Legally Married, **but spouse did not live with me at any time during the last 6 months of the year.**

To prove your spouse did not live with you at any time during the last 6 months of the year;  
Could you provide to IRS, if requested, with any of the following? (Check all that apply)

Lease Agreement or Mortgage Statement in Your Name

Utility Bills in Your Name

Letter(s) from Clergy, family, neighbors, friends, etc

Letter(s) from social services or another governmental agency

Any other supporting documents, if so, what \_\_\_\_\_

Divorced - If IRS requested it, could you provide a divorce decree

Legally Separated - If IRS requested it, could you provide a Separation Agreement

Spouse Deceased - If IRS requested it, could you provide a Death Certificate

2. Name of Qualifying Dependent(s): Relationship:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Note: If the dependent is not related to you, you do not qualify for Head of Household Filing Status.**

3. You must be able to prove you provided **MORE THAN HALF** the cost of maintaining the home of your child or relative. Child support, SNAP and other third-party dollars do not count as support. (Check all items that you have that will provide proof if IRS should request them.)

Rent Receipts or Mortgage Statement

Monthly Amount \_\_\_\_\_

Insurance Documents

Amount \_\_\_\_\_ Mthly / Qtrly

Utilities/Phone Bills

Monthly Amount \_\_\_\_\_

Grocery Receipts

Monthly Amount \_\_\_\_\_

Property Tax Bills

Amount \_\_\_\_\_

Home Maintenance and Repair Bills

Amount \_\_\_\_\_

Any other Household Bills \_\_\_\_\_

4. Is anyone else providing income to the household Yes No If so, who \_\_\_\_\_

**I have disclosed the above information to my income tax professional for them to prepare my 2022 income tax returns. I further submit that this information is correct to the best of my knowledge.**

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **Reviewed By:** \_\_\_\_\_