

2023 DEPENDENTS (AND QUALIFYING RELATIVES) WORKSHEET INDIVIDUAL (FORM 1040)

Name _____

Date _____

The IRS requires documentation to support certain deductions and tax credits claimed for dependents. Your qualification for claiming these dependent-related deductions and tax credits is based on information in this worksheet. Birth Certificates must be provided for child dependents. **The Student Information Worksheet must be completed if education tax credits and deductions are being claimed.**

LIST OF DEPENDENTS (if more than three dependents, use multiple worksheets)

#	Dependent/ Qualifying Relative Name	Relationship	Birthdate	Can Someone Else Claim? (Yes / No)	Dependent permanently and totally disabled during 2022?
1.					
2.					
3.					

OTHER INFORMATION

#	Months Lived with Taxpayer (1-12)	Months "Away" at University (1-12)	Does this Dependent Work? (Yes / No)	Dependent had income over \$4,300? (Excl. Social Security benefits)	Did you provide more than 50% support for this dependent? (Yes / No)	Did this Dependent file their own tax reporting? (Yes/No)
1.						
2.						
3.						

Comments: