

New IRS-Required Documents for 2018-2019

Please be prepared to provide the documents below. We will review them to confirm your eligibility for these credits and/or this filing status:

For Child or Dependent Credits	For Higher Education Credits	For Earned Income Tax Credit	For Head of Household Filing Status
SS card for each dependent claimed	SS card for each dependent claimed	SS card for each dependent. Claimed Child must be under 19, or a student under 24, or anyone who is your dependent who is permanently handicapped	SS Card for each dependent claimed
School and/or Medical Record or daycare or social service records or letter on agency letterhead confirming the child lived with you as your dependent or Birth Certificate	School and/or Medical Record or daycare or social service records or letter on agency letterhead confirming the child lived with you as your dependent or Birth Certificate	School and/or Medical Record or daycare or social service records or letter on agency letterhead confirming the child lived with you as your dependent or Birth Certificate	School and/or Medical Record or daycare or social service records or letter on agency letterhead confirming the child lived with you as your dependent or Birth Certificate
	1098 Tuition Statement or cancelled checks/credit card statements showing the tuition was paid. Copy of transcript or other supporting documents showing the actual qualified education expenses and the individual was at least a student for 6 months.		Documents verifying spouse did not live with you during the last 6 months of the year such as a copy of a signed lease agreement, utility bills, or letter from an agency on their letter head showing that your spouse did not live with you last 6 months of the year
Rent/mortgage payment receipts, grocery bills, property tax bill, repair bills, property insurance statement	Rent/mortgage payment receipts, grocery bills, property tax bill, repair bills, property insurance statement	Rent/mortgage payment receipts, grocery bills, property tax bill, repair bills, property insurance statement	Rent/mortgage payment receipts, grocery bills, property tax bill, repair bills, property insurance statement