

**Dependent  
Questionnaire**

Dependents MUST file a tax return if:

Unearned income (interest, dividends, etc.) is more than \$350 and total income is more than \$1,050.

Unearned income (interest, dividends, etc.) is less than \$350 and total income is more than \$6,300.

**Dependent Information**

Social Security numbers are required for all dependents.

\_\_\_ Check here if no change from previous year.

<u>Full Name</u>	<u>Date of Birth</u>	<u>Relationship</u>	<u>Social Security #</u>	<u># of months at home during 2017</u>	<u>Dependents' 2017 income (optional)</u>		<u>Do you want us to prepare their returns?</u>
					<u>Wages</u>	<u>Interest/Dividends/Other</u>	
_____	_____	_____	- -	_____	_____	_____	Y__ N__
_____	_____	_____	- -	_____	_____	_____	Y__ N__
_____	_____	_____	- -	_____	_____	_____	Y__ N__
_____	_____	_____	- -	_____	_____	_____	Y__ N__
_____	_____	_____	- -	_____	_____	_____	Y__ N__
_____	_____	_____	- -	_____	_____	_____	Y__ N__

**Federal Education Credits**

College education credits are available for tuition and fees paid by taxpayers and their dependents. Refer to your Client Tax Newsletter for more details.

<u>Student Name</u>	<u>Status (grade) on Jan 01, 2017</u>	<u>Tuition and fees paid</u> (Attach 1098-T)	<u>Cost of Books</u>	<u>529 Plan or Education IRA Withdrawals</u>	<u>Scholarships / Grants</u>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

**State Education Deductions and Credits**

Minnesota allows deductions and/or credits for primary and secondary (grades K - 12) education costs. Minnesota requires itemized cash register receipts.

<u>Student Name</u>	<u>Status (grade) on Jan 01, 2017</u>	<u>Tutoring and academic fees</u>	<u>Computer</u>		<u>Books and supplies</u>	<u>Private school tuition paid</u>	<u>Rent of music instruments</u>	<u>Other (describe)</u>
			<u>hardware and educational software</u>	<u>Computer</u>				
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____

**Child Care**

A credit is available for costs to care for dependents while you are at work. You must report the provider(s) name, address and social security number or federal identification number. You are required to report this information even if you have a Dependent Care Benefit plan at work.

**Do you have daycare deducted from your paycheck? Y\_\_\_\_\_ N\_\_\_\_\_**

<u>Name of Provider</u>	<u>Address</u>	<u>Amount Paid</u>	<u>Provider Social Security # or Federal ID #</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____