

Dependents MUST file a tax return if:

Unearned income (interest, dividends, etc.) is more than \$450 and total income is more than \$1,350.

Unearned income (interest, dividends, etc.) is less than \$450 and total income is more than \$15,750.



**Dependent
Questionnaire**

Dependent Information

Social Security #s 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 2025</u>	<u>Dependents' 2025 Income (Optional)</u>		<u>Do you want us to prepare their returns?</u>
					<u>Wages</u>	<u>Interest/Dividends/Other</u>	
							Y <input type="checkbox"/> N <input type="checkbox"/>
							Y <input type="checkbox"/> N <input type="checkbox"/>
							Y <input type="checkbox"/> N <input type="checkbox"/>
							Y <input type="checkbox"/> N <input type="checkbox"/>
							Y <input type="checkbox"/> N <input type="checkbox"/>
							Y <input type="checkbox"/> N <input type="checkbox"/>

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, 2025</u>	<u>Tuition and Fees Paid</u>	<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.

Computer

<u>Student Name</u>	<u>Status (grade) on Jan 01, 2025</u>	<u>Tutoring and Academic Fees</u>	<u>Hardware and Educational Software</u>	<u>Books and Supplies</u>	<u>Private School Tuition Paid</u>	<u>Rent of Music Instruments</u>	<u>Other (Describe)</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 # or federal identification #. 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>