

DEPENDENT & HOUSEHOLD INFORMATION

Life changes—and when your household changes, your tax situation often changes with it. To help us prepare the most accurate return and ensure you receive every credit and deduction you deserve, please use this sheet to record updates to your dependents and household circumstances. Providing complete information now helps us avoid IRS delays, maximize your tax benefits, and keep your Infinity experience seamless.

DEPENDENT INFORMATION

Please list each dependent and provide the following:

- Full Name, Date of Birth, Social Security Number
- Number of months lived with you during the tax year (The IRS requires specific residency information for credits such as CTC, EIC, and HOH status.)
- Childcare expenses paid and provider details
- Education-related expenses (K-12, tutoring, special needs expenses, or college tuition/required fees)

HOUSEHOLD CHANGES

These events can significantly impact your tax filing status, credits, or deductions.

Please indicate if any occurred during the tax year:

- Marriage or divorce
- Birth or adoption
- Death in your immediate family
- Dependents leaving home (college, moving out, shared custody changes, etc.)

If there are additional changes not listed here, please share them—we believe our clients deserve clarity, support, and proactive guidance, especially during times of transition.

IMPORTANT DOCUMENTS TO PROVIDE

To ensure accurate reporting and maximize credits, please upload:

- 1098-T for college students
- Childcare provider EIN and detailed receipts
- Court orders or custody documents (if applicable)
- Adoption paperwork (if applicable)
- Any support agreements or legal documentation that affect dependents

These documents allow us to verify eligibility for dependent-related credits, education benefits, and filing status—helping us protect your return and position you for the best possible outcome.