

HEAD OF HOUSEHOLD FILING STATUS WORKSHEET

Tax Year: _____

1. TAXPAYER INFORMATION

Taxpayer Name: _____

SSN: _____

2. QUALIFYING PERSON TEST

Name of Qualifying Person: _____

Relationship: _____

To qualify as a Head of Household, the qualifying person must have lived with you for more than half the year (except for temporary absences or a qualifying parent).

- ☐ Did the qualifying person live in your home for more than half of the tax year?
- ☐ Was the qualifying person single/unmarried at the end of the tax year?
- ☐ Did you claim the qualifying person as a dependent on your tax return?

3. COST OF MAINTAINING A HOME WORKSHEET

Complete the table below to determine if you paid more than half the cost of keeping up a home for the tax year.

Expenses	Amount Paid by Taxpayer	Total Cost Incurred
Rent or Mortgage Interest		
Property Taxes		
Home Insurance		
Repairs and Maintenance		
Utilities (Gas, Electric, Water, Trash)		
Food Consumed on the Premises		
Other Necessary Household Expenses		
Total Costs (Sum of all lines)		

4. DETERMINATION

- ☐ Is the total amount paid by the taxpayer more than 50% of the total cost incurred?
- ☐ Do you meet all requirements to file as Head of Household?

Taxpayer Signature: _____

Date: _____

Preparer Signature (if applicable): _____

Date: _____

