

2024 EARNED INCOME TAX CREDIT

The IRS now requires tax return preparers to complete a due diligence checklist with all income tax returns that contain certain credits and deductions, with steep penalties for noncompliance. Your return qualifies for the following special credits/deductions; therefore, it is imperative you read and understand this entire document. **YOUR RETURN WILL NOT BE FINALIZED UNTIL YOU ANSWER EACH QUESTION BELOW AND SIGN AND RETURN THIS DOCUMENT TO US.**

EARNED INCOME TAX CREDIT:

This credit is based on the level of your income for 2024, and whether or not you have qualifying children. In order to qualify, you must meet ALL OF the following requirements, in addition to the income requirements:

- You must have a valid social security number by the due date of your return.
- Your filing status cannot be married filing separately.
- You must be a US citizen or resident alien for the full year.
- You cannot have foreign earned income.
- Your investment income for 2024 (including non-taxable interest and dividends) cannot be greater than \$10,000.

Do you meet all the requirements above? YES NO

By completing this form, you acknowledge and affirm the information provided by you is complete and accurate to the best of your knowledge. You also affirm you are in no way attempting to file a fraudulent claim by providing the tax preparer with false or intentionally omitted information and documentation. You must have and retain appropriate documentation in case of an audit.