

EIC Due Diligence Assistant

(This page is not filed with the return. It is for your records only.)

2021

Name(s) as shown on return

Tax ID Number

Part I All Taxpayers

1	Enter preparer's name and PTIN ▶ _____	
2	Is the taxpayer's filing status married filing separately?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▶ If you checked " No " on line 2, go to line 3. Otherwise, go to line 2a.	
2a	Does the taxpayer have a qualifying child?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▶ If you checked " No " on line 2a, stop ; the taxpayer cannot take the EIC. Otherwise, continue.	
2b	Did the taxpayer either live apart from his or her spouse for the last six months of the year, or live apart from his or her spouse at the end of the year and have a decree of separate maintenance, written separation agreement, or decree requiring one spouse to make payments for support or maintenance of the other?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▶ If you checked " No " on line 2b, stop ; the taxpayer cannot take the EIC. Otherwise, continue.	
3	Does the taxpayer (and the taxpayer's spouse if filing jointly) have a social security number (SSN) that allows him or her to work and is valid for EIC purposes? See the instructions before answering	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▶ If you checked " No " on line 3, stop ; the taxpayer cannot take the EIC. Otherwise, continue.	
4	Is the taxpayer (or the taxpayer's spouse if filing jointly) filing Form 2555 (relating to the exclusion of foreign earned income)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▶ If you checked " Yes " on line 4, stop ; the taxpayer cannot take the EIC. Otherwise, continue.	
5a	Was the taxpayer (or the taxpayer's spouse) a nonresident alien for any part of 2021?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▶ If you checked " Yes " on line 5a, go to line 5b. Otherwise, skip line 5b and go to line 6.	
b	Is the taxpayer's filing status married filing jointly?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▶ If you checked " Yes " on line 5a and " No " on line 5b, stop ; the taxpayer cannot take the EIC. Otherwise, continue.	
6	Is the taxpayer's investment income more than \$10,000?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▶ If you checked " Yes " on line 6, stop ; the taxpayer cannot take the EIC. Otherwise, continue.	
7	Could the taxpayer be a qualifying child of another person for 2021? If the taxpayer's filing status is married filing jointly, check " No. "	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▶ If you checked " Yes " on line 7, stop ; the taxpayer cannot take the EIC. Otherwise, go to Part II or Part III, whichever applies.	

Your signature	Date	Spouse's signature. If joint return, BOTH must sign.	Date
Paid preparer's signature	Date		