

Head of Household Worksheet

TAX YEAR 2026 | 2027 FILING SEASON | DRAFT FOR REVIEW

Client name: _____ Date: _____

List annual costs of maintaining the home and amounts you personally paid. Do not include clothing, education, medical expenses or transportation as home upkeep. Preparer will review marital status and qualifying person rules.

Marital status on December 31; spouse living arrangements in last six months

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Qualifying person / relationship / months in home

Rent or mortgage interest / property taxes: total and paid by you

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Utilities / home insurance: total and paid by you

Repairs / food eaten at home: total and paid by you

Other eligible costs: total and paid by you

Total eligible costs / amount you paid / contributions by others

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Supporting records available

Client signature: _____ Date: _____

Spouse signature (if applicable): _____ Date: _____