

Requirements to claim the Earned Income Tax Credit (EITC)

- Must have earned income (wages from employment or self-employment, taxable pension or disability retirement payments)
- Must have a valid Social Security number
- Must be a U.S. citizen or resident alien for the entire year or a non-resident alien married to a U.S. citizen or resident alien filing a joint return
- Must be 25-64 years of age at the end of the year, live in the United States for more than half the year, and cannot qualify as a dependent of another person.
- You cannot be the qualifying child of another person
- Investment income is limited to \$3,100 or less

What to bring to your appointment:

- **Photo ID & Social Security Card or ITIN number** for you, your spouse if married and your children
- **All W-2 Forms** (earning statements) from every employer you worked for during 2011
- **Child care expenses:** total of payments made and the name, address and Employer Identification Number (EIN) or Social Security number of the provider.
- **Form 1098** (tuition payment statement) for each household member who attended college in 2011 and the total amount of student loan interest you may have paid
- **Total rent paid** in 2011 and landlord or rental agent's name and address
- **Your checkbook** or bank statement if you want to direct deposit your refund
- **Copy of last year's income tax return**
- **Proof of medical insurance** (for Massachusetts state return): 1099HC for private insurance or health care card for government sponsored plans