



Department of Treasury
Internal Revenue Service

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Notice	CP09 (joint)
Tax Year	2011
Notice date	July 1, 2012
Social Security number	XXX-XX-9999
To contact us	Phone [Redacted]
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Important information about the Earned Income Credit

You may be eligible for a refund of up to \$5,751

Our records show that you may be eligible for the Earned Income Credit (EIC), but didn't claim it on your 2011 tax form. Depending on your earnings and eligibility, your benefit can be up to \$5,751.

Do not discard or overlook this notice because you may be entitled to some additional money.

Summary

The credit, which can be up to \$5,751, is for certain people who have worked and earned income. Please complete the worksheet on Page 3 to determine if you're eligible for the credit.

What you need to do

Complete the Earned Income Credit Worksheet on page 3.

If the worksheet confirms that you're eligible for the credit

- Sign and date the attached worksheet, and mail it to us in the enclosed envelope.

If the worksheet indicates that you're not eligible for the credit

- Please do not return the worksheet to us.

Next steps

If you're eligible for the credit, we'll send you a refund check in 6–8 weeks, as long as you don't owe tax or any other debts we're required to collect.

When you file your Form 1040 next year,

- Claim the credit if you are still eligible.
- Write "NO" on the EIC line if you don't want or don't qualify for the credit.
- You can also ask the IRS to figure the EIC credit for you. Write "EIC" on the EIC line, complete Schedule EIC, and attach it to your return. If you qualify for the credit, the IRS will calculate it for you.

If you're not eligible for the credit, we will notify you by mail.

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Additional information

- Visit www.irs.gov/cp09. You can also find the following online:
 - Form 1040 or 1040A
 - Earned Income Credit (Publication 596)
- For tax forms, instructions, and publication, visit www.irs.gov or call 1-800-TAX-FORM (1-800-829-3676).

If you need assistance, please don't hesitate to contact us.



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INTERNAL REVENUE SERVICE

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Earned Income Credit Worksheet

- Step 1** Read each statement listed below, and place a check mark next to any that describes you or your spouse.
- ☐ My or my spouse's Social Security card reads "Not Valid for Employment", and was issued so one of us could receive a federally funded benefit, such as Medicaid.
 - ☐ I am or my spouse is an Earned Income Credit qualifying dependent of another person. Being an EIC qualifying dependent of another person means that you meet all of the following criteria:
 - You are that person's son, daughter, stepchild, grandchild, or foster child. Or, you are that person's brother, sister, half brother, half sister, stepbrother, or stepsister (or the child or grandchild of that person's brother, sister, half brother, half sister, stepbrother, or stepsister).
 - You were under age 19 at the end of the year and younger than that person (or that person's spouse, if the person files jointly). Or, you were under age 24 at the end of the year, a student, and younger than that person (or that person's spouse, if the person files jointly). Or, you were permanently and totally disabled, regardless of age.
 - You lived with that person in the United States for more than half of the year.
 - You are not filing a joint return for the year (or are filing a joint return only as a claim for refund).
 - If you **checked any** of the above boxes, **you're not eligible** for the credit. Please do not continue completing this worksheet.
 - If you **did not check any** of the above boxes, **you're eligible** for the credit. Please continue to Step 2 on the next page.

Step 2

Provide the information requested below for no more than three of your dependents who lived with you or your spouse in 2011, and are related to you or your spouse. A dependent is related to you if they are your son, daughter, stepchild, adopted child, brother, sister, stepbrother, stepsister, or any of their descendants, or a foster child.

Do not provide information if:

- The dependent has a Social Security card that reads “Not Valid for Employment” and the Social Security number was issued so the dependent could receive a federally funded benefit, such as Medicaid.
- The dependent filed a joint return for reasons other than claiming a tax refund.

Step 2

Provide the information requested below for no more than three of your dependents who lived with you or your spouse in 2011, and are related to you or your spouse. A dependent is related to you if they are your son, daughter, stepchild, adopted child, brother, sister, stepbrother, stepsister, or any of their descendants, or a foster child.

Do not provide information if:

- The dependent has a Social Security card that reads "Not Valid for Employment" and the Social Security number was issued so the dependent could receive a federally funded benefit, such as Medicaid.
- The dependent filed a joint return for reasons other than claiming a tax refund.

Dependent #1

Name _____ Social Security number _____ or Taxpayer ID number _____

Did the dependent live with you or your spouse in the U.S. for more than 6 months in 2011? ☐ Yes ☐ No

Was the dependent any of the following:

- Born after January 1, 1993, or
- Born after January 1, 1988 and a student, or
- Permanently disabled during 2011? ☐ Yes ☐ No

Is the dependent younger than you or your spouse? ☐ Yes ☐ No

Dependent #2

Name _____ Social Security number _____ or Taxpayer ID number _____

Did the dependent live with you or your spouse in the U.S. for more than 6 months in 2011? ☐ Yes ☐ No

Was the dependent any of the following:

- Born after January 1, 1993, or
- Born after January 1, 1988 and a student, or
- Permanently disabled during 2011? ☐ Yes ☐ No

Is the dependent younger than you or your spouse? ☐ Yes ☐ No

Dependent #3

Name _____ Social Security number _____ or Taxpayer ID number _____

Did the dependent live with you or your spouse in the U.S. for more than 6 months in 2011? ☐ Yes ☐ No

Was the dependent any of the following:

- Born after January 1, 1993, or
- Born after January 1, 1988 and a student, or
- Permanently disabled during 2011? ☐ Yes ☐ No

Is the dependent younger than you or your spouse? ☐ Yes ☐ No

Step 3

Refer to your answers from Step 2 to determine if your dependents meet the requirements.

- If you answered **no** to **any** questions for a dependent, he or she **doesn't meet** the requirements.
- If you answered **yes** to **all** questions for a dependent, he or she **meets** the requirements.

How many dependents meet the requirements? _____

If at least one dependent meets the requirements

- If at least one dependent meets the requirements, you are eligible for the credit. Continue to Step 4.

(Keep in mind that a dependent who meets the requirements can only be claimed by one person. If you and someone else claim the same dependent, the IRS will use guidelines found in Publication 596 to determine who is eligible for the credit.)

If none of your dependents meet the requirements

- If none of your dependents meet the requirements, you are not eligible for the credit. Please do not continue completing this worksheet.

Step 4

Sign and date the statement if you are eligible for the credit.

Under penalties of perjury, I declare that this information is true and correct to the best of my knowledge.

Your signature _____

Date _____

Your spouse's signature _____

Date _____

☐ a.m.
☐ p.m.

☐ a.m.
☐ p.m.

Primary phone _____

Best time to call _____

Secondary phone _____

Best time to call _____

