



Adoption Tax Credit * Checklist

☐ **Qualified expenses to claim**

Claim only reasonable and necessary adoption expenses such as:

- ☐ Court costs,
- ☐ Attorney fees,
- ☐ Adoption agency fees,
- ☐ Travel expenses related to the adoption.

☐ **Documents to keep**

Keep clear records showing what you paid and to whom for each year:

- ☐ Save receipts and invoices,
- ☐ Keep copies of bank or credit card statements,
- ☐ Keep legal adoption agreements or court documents.

☐ **Final check before filing**

- Make sure all expenses qualify as adoption costs,
- Verify that you included all required forms (**Form 8839**, **W-7A**, or **W-7**),
- Review your records for accuracy before submitting your return.

☐ **If the child is a U.S. citizen or resident alien and you cannot get a Social Security Number (SSN) for the child before filing your return:**

- ☐ Apply for an Adoption Taxpayer Identification Number (ATIN) using **Form W-7A**.

☐ **If the child is NOT a U.S. citizen or resident alien and you cannot get a SSN for the child before filing your return:**

- ☐ Apply for an Individual Taxpayer Identification Number (ITIN) using **Form W-7**.

For more information, visit:
[IRS.gov/adoption](https://www.irs.gov/adoption)

