



# Adoption Credit Limit Worksheet

## Step 1: Taxpayer Information

- Name: \_\_\_\_\_ 
- Tax Year: \_\_\_\_\_
- Filing Status:  
 Single  Married Filing Jointly  Head of Household  Married Filing Separately


## Step 2: Adoption Information

Adopted Child's Name	Date of Birth	Adoption Finalized (Y/N)	Special Needs (Y/N)
			


Note: A special needs child may qualify for the full credit amount regardless of actual expenses.

## Step 3: Qualified Adoption Expenses

List all eligible adoption-related expenses incurred.

Expense Type	Amount (\$)
Adoption agency fees	
Court and legal fees 	
Travel expenses (lodging, meals, transportation)	
Home study fees	
Other expenses	
<b>Total Qualified Expenses (A)</b>	<b>\$ _____</b>

## Step 4: Income Limitation (Phaseout Calculation)

- Modified Adjusted Gross Income (MAGI): \$  \_\_\_\_\_
- Phaseout Threshold (for the year): \$ \_\_\_\_\_
- Income Over Threshold: \$ \_\_\_\_\_
- Phaseout Percentage Applied: \_\_\_\_\_%
- Reduced Credit (if applicable): \$ \_\_\_\_\_

Note: The adoption credit phases out for taxpayers with MAGI above the income threshold set by the IRS for the year.



## Step 5: Adoption Credit Limit Calculation

Description	Amount (\$)
Maximum Adoption Credit Per Child	\$ _____
Total Qualified Expenses from Step 3 (A)	\$ _____
Adjusted Credit After Income Limitations (if applicable)	\$ _____
<b>Final Adoption Credit Amount (B)</b>	<b>\$ _____</b>