College & Childcare

Use for education costs, student loans, or paid dependent care.

Client name: Tax year:

01 | Students and dependents

List each person receiving education or care: name, age, relationship, and whether another person may claim them. Do not enter SSNs.

02 | School enrollment

School name, degree/program, enrollment months, full/part-time status, prior years of college, and education credits claimed in earlier years.

03 | Tuition and school payments

Who paid what, when, and from which source? Provide Form 1098-T plus the detailed student account statement and payment receipts.

04 | Scholarships and aid

Scholarships/grants, employer assistance, veterans benefits, and amounts used for tuition, books, housing, or other costs. Include restrictions and award letters.

05 | Books and supplies

List required books, supplies, equipment, fees, and related purchase records. Separate housing, meals, transportation, and other personal costs.

06 | Education savings and loans

529/Coverdell withdrawals, Form 1099-Q, student-loan interest/Form 1098-E, loan payments, and who is legally responsible for the loan.

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07 | Care recipient

Who received care, their age, relevant inability-to-self-care facts if applicable, and the dates they lived with you?

08 | Care providers

Provider name/address, type of care, dates, and amount paid per recipient. Provide provider tax identification through the secure portal only.

09 | Reason for care

Was care needed so you/spouse could work or look for work? Describe work, job-search, student, or other relevant circumstances and dates.

10 | Benefits and reimbursement

Any employer dependent-care benefits, flexible spending account, assistance, reimbursements, or costs paid by another person? Include W-2 box 10 if applicable.

11 | Shared claims and prior issues

Other parents/claimants, custody/release documents, prior denied credits, notices, or education/care costs used for another tax benefit?

12 | Records and questions

List missing statements, receipts, provider forms, and questions. Your preparer will check which costs and benefits qualify for the filing year.

Answer every item. Write None or Not sure when needed. Add a page for extra people/assets.
Save and reopen to check answers. Return only through your own preparer's secure portal.
This questionnaire is not an e-file authorization, tax election, or determination of eligibility.