

Education Credit Questionnaire:

Client Name:

Tax Year:

Please answer the following questions to the best of your knowledge in relation to the children you are currently claiming as dependents on your tax return:

1. Children's Names:

Child #1:

Child #2:

Child #3:

Child #4:

2. What college do each of your children attend? Please list child's name and school below:

3. Would you be able to provide documentation to prove the above information if the IRS were to ask for such documentation?

4. Are all children the biological children of the taxpayer and spouse?

5. To the best of your knowledge, can anyone else claim the children on their tax return?

6. Have you ever allowed someone else to claim one of more of the children on their tax return?

7. Did the children reside at your residence all year long? (Being away at college is considered living at your personal residence)

8. Have you ever been disallowed a tax credit related to claiming a child in a previous year?

Education Credit Questionnaire:

9. Are all children citizens of the USA?

10. Did they receive any scholarships not reported on their 1098-T? If so, how much?

11. Did they withdraw/drop any classes during the year?

12. Please provide the following expenses related to your college student, including what was reported on the 1098-T:

Tuition

Books

Room & Board

Computer/Supplies

Name

Date