

Child & Dependent Care Expenses and Education Credits

Child & Dependent Care Expenses

For Dependent (name): _____

Provider Name	EIN or SSN	Address	Amount Paid

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Provider Name	EIN or SSN	Address	Amount Paid

Child & Dependent Care Notes

Care expenses for children or disabled adult dependents must be incurred so that you *and* (if applicable) your spouse can work or attend school.

Summer day camps attended so parents can work can be included on this form. "Sleep away" camps should not be included.

Please include all information requested. If your tax professional must research information you may incur additional charges.

Higher Education Expenses

Attach all Forms 1098-T. Also include a calendar year financial (not academic) transcript for each institution attended. This transcript should clearly show amounts billed, amounts paid, and the dates of each billing/payment.

Student Name: _____

Graduate Student?	_____	Undergrad Year?	_____
Full-time Student?	_____	Terms Attended	_____
		Spring	Fall
Books	_____	Parking Permit	_____
Lab Fees	_____	Other Fees	_____
Special Equipment	_____	Supplies	_____
Other (describe)	_____ _____		

Student Name: _____

Graduate Student?	_____	Undergrad Year?	_____
Full-time Student?	_____	Terms Attended	_____
		Spring	Fall
Books	_____	Parking Permit	_____
Lab Fees	_____	Other Fees	_____
Special Equipment	_____	Supplies	_____
Other (describe)	_____ _____		

Education Expense Notes

If not included on the financial transcript be sure to include amounts for lab, parking, and other fees as well as books and other required equipment and supplies (special software, paper, etc.). *Do not include room and board expenses or other personal items (dorm furnishings, etc.)!*

Education credits require additional due diligence *and are a highly audited area*. Please provide complete and accurate information. And please be prepared to answer follow up questions for each student/credit being claimed.

It is important to know what year of undergraduate education each student was completing in 2018. Is it the student's first year? Or their fifth? Which terms were attended? Full or part time? Again, please complete all necessary information.