CHILD AND DEPENDENT CARE EXPENSE

primary purpose allows you to go to work or look for work and not for educational purposes

Tax Topic 602

Child & dependent care:	Child #1	Child #2
Child Name:		
Amount Paid by child:		
Child Care Provider #1 SSN # or EIN #		
Name of provider		
Address of provider		
Amount Paid by child:		
Child Care Provider #2 SSN # or EIN #		
Name of provider		
Address of provider		

529 Plan (TRowe Price - Maryland Plan)

Administrative Release 32

		Husband Account: 1	**Wife Account: 2**
Contribution Amount: Child 1	Name:		
Contribution Amount: Child 2	Name:		
Contribution Amount: Child 3	Name:		
Contribution Amount: Child 4	Name:		

Did you withdrawl money from the 529 for tuition for a child in K thru 12 school? Y N

How much was withdrawn for each child? And from which account?

Withdrawl Amount: Child 1	Name:		
Withdrawl Amount: Child 2	Name:		
Withdrawl Amount: Child 3	Name:		
Withdrawl Amount: Child 4	Name:		

EDUCATION CREDITS - (Vocational, Certificate, Degree)

Publication 970 — IRS Video — IRS Information

*** Provide 1098-T for each School**

Student Name	Student #1	Student #2
Went at least half time of a normal full-time degree program	Y N	Y N
Enrolled in 1 or more courses	Y N	Y N
Pursuing a degree?	Y N	Y N
Amount of Tuition & Registration Fees Paid: (no transportation, health insurance or room & board)		
Amount paid course materials (books, supplies, & equipment)		
Who paid for the Tuition and Fees? (Self, Parents, third party)		
Was the student convicted of a felony for possession or distribution of a controlled substance?	Y N	Y N

Has the student claim an Education Credit in any prior years? Y N Y N

If yes, bring a copy of the tax return that the education credit was claimed if the tax return was not prepared by our office.

ADOPTION EXPENSES

Tax Topic 607

Is the child a US citizen or Foreign child?	US Foreign
Child's Name	
Child's Year of Birth	
Child's ID Number	
Is the child a special needs child?	Y N
Was the child born before 1991 and disabled?	Y N
Did your employer provided you with adoption benefits?	Y N
Date the Adoption became final?	
Adoption Expenses (Adoption Fee, Attorney, Court, and Travel while away from home)	