



Education Due Diligence Interview Question

Last Name _____

Last 4 SSN _____

Who attended school? Taxpayer/Spouse Dependent (a due diligence is needed for each student)

EDUCATION DOCUMENTATION

Does the taxpayer have 1098-T? Yes – Skip to Section 2 No – Go to Section 1

SECTION 1 – SCHOOL INFORMATION

Name of School _____

Address _____

City State Zip _____

EIN if known _____

Area of Study _____ Full Time Part Time

Why is there no 1098-T _____

SECTION 2 - EXPENSES

Does the taxpayer have additional expenses? Yes – Continue below No – Due Diligence Complete

Additional Expenses

List eligible expenses:

\$_____ Tuition Cost \$_____ Laptops/Electronics \$_____ Equipment
\$_____ Books \$_____ School Supplies \$_____ Other _____

NOTES

Taxpayer Signature: _____

Date _____

Tax Professionals Signature: _____

Date _____

