



**SUSAN SILVERMAN QUIGLEY, CFP®**  
CERTIFIED FINANCIAL PLANNER

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## Dependent Information

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### Children Information

Please fill out all questions and upload any related forms to the Tax Portal

1	Child 1 Name	DOB	Social Security
2	Child 2 Name	DOB	Social Security
3	Child 3 Name	DOB	Social Security
4	Child 4 Name	DOB	Social Security

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### Child Care Expenses

- 1 Do you have Child Care Expenses for Dependent Care or Child Care Credit?  
If so, WE MUST HAVE CHILD CARE TAX ID. Please enter the TAX ID.
- 2 We MUST HAVE NAME OF ORGANIZATION, CAMP OR PERSON, ADDRESS, AMOUNT SPENT PER CHILD  
Please enter info below.

Organization Name	Address		
EIN	Amount \$	Child Name	

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### College Related Expenses

College related items to include: forms 1098T, 1099Q from 529s, list of student related expenses

- 1 If you had college expenses, who was it for?      Parent (you)      Spouse      Child 1      Child 2
  - 2 If you had colleges expenses, please list amounts  
(books, room & board, tech, & fees)  
Please upload forms 1098T to the portal for each child
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### Adult Dependents

If you have any Adult Dependents living with you (you provide more than half their support) OR  
Parents you provide half support for (even if they don't live with you).  
Please provide the info below.

1	Dependent 1 Name	DOB	Social Security
2	Dependent 2 Name	DOB	Social Security