

Higher Education Contributions or Expenses
(We will need form 1098-T and Account Summary of Tuition)

Taxpayer Name: _____

Students Name: _____

Did you contribute to a "529" college savings plan?

Name: _____ SS#: _____ Amount: _____

Name: _____ SS#: _____ Amount: _____

Name: _____ SS#: _____ Amount: _____

Did anyone have Higher Education Expenses, if yes who? _____

YES NO

Were expenses paid or reimbursed by employer-provided educational assistance?

YES NO

Has the student ever been convicted of a felony for the possession or distribution of a controlled substance (drugs)? YES NO

Was the student enrolled at least half time?

YES NO

How many months was the student in school at least half time? _____

Has the student completed the first 4 years of postsecondary education? YES NO

If not, how many years have you claimed the American opportunity tax credit? _____

Did you pay additional amounts for books? YES NO

Did you pay for Room & Board? YES NO

Did you receive any Scholarships or grants? YES NO

Are there any other fees not on Form 1098-T? YES NO

Was any money from savings bonds used to pay for Higher Education?

YES NO

Was any money used to pay for expenses from an educational savings account (ie. 529 Plan, Coverdell, or similar)? YES NO

Does the student have earned income? If yes, how much for the year _____

YES NO

Were any Student Loans taken by the child/dependent to pay for their education, support etc.?

YES NO If yes, what amount was taken in loans by student? _____

By signing below, I verify that the above information is true and correct.

Taxpayer Signature

Date

Spouse Signature

Date