

College Education Credits

Please include a copy of the student's Form 1098-T and/or 1098-E **AND** an account statement from the institution showing the amount(s) actually paid.

If the student works, please check to see if he/she needs to file a tax return.

If a student/dependent files & claims themselves, the parents lose the education credits and the exemption deduction.

Student Name: _____

Level/Year in School (circle)

Fresh – Soph – Jr - Sr

Fresh – Soph – Jr - Sr

Fresh – Soph – Jr - Sr

Enrolled in a program leading to a degree, certificate, or credential?

Education to acquire or improve job skills?

Take at least 1/2 a full-time workload during at least part of 5 months during the tax year?

Convicted of a felony for possessing or distributing a controlled substance?

FASFA needed for the next year?

YES

NO

1098-T included

YES

NO

1098-E included

YES

NO

Statement of account provided?

YES

NO

Please make sure students do not claim themselves for taxes. If they do, an amended return must be filed. It will delay your refund by months. We give at least a 50% discount for all dependent returns.