

Educational Credits Questionnaire

We're sorry, but IRS requires that we have this information for EACH student

1. Student's name _____
(exactly as it appears on the student's social security card)

2. Name of the accredited institution(s) in which the student attended classes and has received a Form 1098-T (Form is required to claim education credits)

3. Was the student considered to be "at least a half-time student" for at least 5 months during the calendar year 2022?

(Box 8 on Form 1098-T is checked) Yes No

4. Has the student attended college any "4" previous calendar years? Yes No

5. Has the student been convicted of a felony for possession or distribution of a controlled substance before December 31, 2022? Yes No

6. How much was "PAID" by you either directly by check, from student loans, or from College Choice 529 to the institution(s) during calendar 2022?

Tuition and Fees (not Room & Board) \$ _____ **Form 1098-T Box 1**

Books and Required Supplies \$ _____ **From receipts**

7. Additional Information

Scholarships and Grants \$ _____ **Form 1098-T Box 5**

529 Distribution Earnings \$ _____ **Form 1099-Q Box 2**

8. Is proof of the above information available if IRS were to request it? Yes No

I have disclosed the above information to my income tax preparer to prepare my 2022 Tax Return and I further submit that this information is correct to the best of my knowledge and I can prove and produce records if requested.

Signature: _____ **Date:** _____ **Reviewed by** _____