

# Educational Credits Questionnaire

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

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**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 \_\_\_\_\_?**

**(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, \_\_\_\_\_?** ☐ 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 year \_\_\_\_\_?**

**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

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I have disclosed the above information to my income tax preparer to prepare my \_\_\_\_\_ 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** \_\_\_\_\_