

**Education Expense Worksheet**

Please complete the information below for each student and school attended and include the Form 1098-T provided by the school.
Note: The Trade Preferences Extension Act of 2015 added a rule that taxpayers claiming the education credit must have a completed Form 1098-T; otherwise, no credit is allowable.

Name of Student _____

Has the student listed above been convicted of a felony _____

yes or no

What year in school is the student?

Freshman Sophomore Junior Senior Graduate School

and first year attended? _____

Is the student a candidate for a degree?

yes or no

How many times has education credits been claimed for this student? _____

Which tax returns (by year) were the credits claimed in prior years: _____

If education credits have been claimed in previous years, please provide copies of tax returns if not prepared by our firm.

If any employer assistance, scholarships, or educational savings accounts were used to pay for school expenses, please provide details.

School Name: _____	Form 1098-T	Actually paid	Dates paid	How paid (check, loan, etc)
Tuition (Must Provide Form 1098-T)	_____	_____	_____	_____
Room and Board (paid to the School)	_____	_____	_____	_____
Off campus housing (rent and utilities only)	_____	_____	_____	_____
Books required as part of enrollment	_____	_____	_____	_____

School Name: _____	Form 1098-T	Actually paid	Dates paid	How paid (check, loan, etc)
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Room and Board (paid to the School)	_____	_____	_____	_____
Off campus housing (rent and utilities only)	_____	_____	_____	_____
Books required as part of enrollment	_____	_____	_____	_____

Required Documents to claim education expenses:

Form 1098-T from each institution attended

Transaction Summary statement from each school showing the payments and charges for each semester

Name : _____ Signature _____ Date: _____

(Form should be completed by either primary taxpayer or spouse if completing for a dependent)