

**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)