

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 _____?

(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**

Total Available for Credit \$ _____

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 _____ 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** _____