

J-tax-S Inc.

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Higher Education Contributions or Expenses

(We will need form 1098-T and Account Summary of Tuition)

Students Name: _____

Did anyone have Higher Education Expenses, if yes who? _____

YES NO

Were expenses paid by employer-provided educational assistance?

YES NO

Has the student ever been convicted of a felony for the possession or distribution of a controlled substance (drugs)?

YES NO

How many months was the student in school? _____

Was the student enrolled at least half time for at least one academic period?

YES NO

Has the student completed the first 4 years of postsecondary education (a grad student)? YES NO

If not, how many years have you claimed the American opportunity tax credit? _____

Did you pay additional amounts for books? YES NO

Did you pay for Room & Board? YES NO

Did you receive any Scholarships or grants? YES NO

Are there any other fees not on Form 1098-T? YES NO

Was any money from savings bonds or education savings accounts used to pay for Higher Education?

YES NO

Was any money used to pay for expenses from an educational savings account (ie. 529Plan, Coverdell, or similar)? YES NO

Does the student have earned income? If yes, how much for the year _____

YES NO

Were any Student Loans taken by the child/dependent to pay for their education, support etc.?

YES NO

Did you contribute to a "529" college savings plan for your **child** or **grandchild**? (circle which applies)

Name: _____ Name: _____ Name: _____

Amount: _____ Amount: _____ Amount: _____

By signing below, I verify that the above information is true and correct.

Taxpayer Signature

Date

Spouse Signature

Date