

Education Credits

Name:

SSN:

Provide all Form(s) 1098-T

Student's first and last name: \_\_\_\_\_ SSN: \_\_\_\_\_

Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of four times in any prior years? .....  Yes

Was the student enrolled at least half-time for at least one academic period that began in 2021 at an eligible education institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary educational credential? .....

Did the student complete the first four years of post-secondary education before 2021? .....

Was the student convicted, before the end of 2021, of a felony for possession or distribution of a controlled substance? .....

Is the student pursuing a degree? .....

Number of years the American Opportunity Credit has been claimed for this student \_\_\_\_\_

	2021	2020
Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution	_____	_____
ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution	_____	_____
Tax-free education assistance received in 2021 allocable to the academic period	_____	_____
Tax-free education assistance received in 2022 (and before 2021 return is filed) allocable to the academic period	_____	_____
Refunds of qualified education expenses paid in 2021 if the refund is received before the 2021 return is filed	_____	_____

Did the student receive Form 1098-T from this institution for 2021?  Yes  No

Did the student receive Form 1098-T from this institution for 2020 with box 7 checked?  Yes  No

EIN \_\_\_\_\_

Educational Institution Name \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Student's first and last name: \_\_\_\_\_ SSN: \_\_\_\_\_

Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of four times in any prior years? .....  Yes

Was the student enrolled at least half-time for at least one academic period that began in 2021 at an eligible education institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary educational credential? .....

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Number of years the American Opportunity Credit has been claimed for this student \_\_\_\_\_

	2021	2020
Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution	_____	_____
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Tax-free education assistance received in 2021 allocable to the academic period	_____	_____
Tax-free education assistance received in 2022 (and before 2021 return is filed) allocable to the academic period	_____	_____
Refunds of qualified education expenses paid in 2021 if the refund is received before the 2021 return is filed	_____	_____

Did the student receive Form 1098-T from this institution for 2021?  Yes  No

Did the student receive Form 1098-T from this institution for 2020 with box 7 checked?  Yes  No

EIN \_\_\_\_\_

Educational Institution Name \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_