

COLLEGE TUITION

FOR 2014 TAX YEAR

If Clients have College Expenses on Tuition, Books, Computer, or other expenses, OUT OF THEIR POCKET, or loan,
We need the following information for each student.

BE AWARE: It is the taxpayer's responsibility to answer all these questions correctly, so take your time and be correct. It is not the responsibility of Gary's Tax Service to complete this form.

1. Name of Student: _____
2. Student's Social Security #: _____
3. Name of Education Institution: _____
4. Full Address of the Institution: _____

5. Did the student receive Form 1098-T from this institution for 2014? Yes _____ No _____
6. Did the student receive Form 1098-T from this institution for 2013? Yes _____ No _____
7. If YES in 5 & 6, enter the institution's EIN # from Form 1098-T: EIN# _____
8. Has the Hope Scholarship Credit or American Opportunity Credit been claimed for the student for any 4 prior years? Example: You claimed 2013, 2012, 2009, 2007 Yes _____ No _____
9. Amount you paid from pocket, or loan for the Tuition in 2014? SCHOLARSHIP NOT INCLUDED.
For Tuition: \$ _____
For Items Purchased (Computer/Books/Supplies etc.) : \$ _____
10. Was the student enrolled at least half-time for at least one academic period that began in 2014 at an eligible educational institution in a program leading towards a postsecondary degree, certificate, or other recognized postsecondary educational credential? Yes _____ No _____
11. Did the student complete the first 4 years of postsecondary education before 2014? Yes _____ No _____
12. Was the student convicted, before the end of 2014, of a felony for possession or distribution of a controlled substance? Yes _____ No _____

Signed Name: _____ Date: _____

Printed Name: _____ Date: _____