

COLLEGE EXPENSE ORGANIZER

A) Annual Questions: Student's First Name: _____

1. Number of postsecondary education years completed as of January 1 of the tax year of the return (Freshman=0, Sophomores=1, Juniors=2, Seniors=3, Graduate = 4+) _____
2. How many months (or partial months) was the student full-time? _____
3. In how many prior tax years (calendar) were the following credits claimed for this student?
 - a. American Opportunity Credit: _____
 - b. Hope Credit: _____

*If you are unsure please supply prior returns or ask your prior preparer.

4. Where were they enrolled? _____

Was the student: _____ **Y (Yes) or N (No)**

5. A nonresident alien for tax purposes for any part of the year? _____
6. Enrolled in a program leading to a degree/certificate/credential? _____
7. Enrolled in a postsecondary degree program or seeking job skills? _____
8. Enrolled at least half-time for at least one semester? _____
9. Ever been convicted of a felony for possessing/distributing a controlled substance? _____

B) Education Expenses: (Round to the nearest dollar)

1. Payments received by the school for Tuition during last calendar year: \$ _____
(If unsure please verify with the school. This may not be the same as amount billed, 1098-T)

2. Amounts **required** to be paid direct to college/university as a condition of enrollment:

- a. Books \$ _____
- b. Fees (Lab, etc.) \$ _____
- c. Course Supplies \$ _____
- d. Equipment required for course(s) listed in syllabus \$ _____

3. Amounts **not required** to be paid direct to college/university, but still required for class:

- a. Books \$ _____
- b. Fees (Lab, etc.) \$ _____
- c. Course Supplies \$ _____
- d. Equipment required for course(s) listed in syllabus \$ _____

4. --Items below are only necessary if 1099-Q or similar distributions received:

- a. Room & Board: \$ _____
- b. Computer Expenses: \$ _____
- c. Educ Savings Acct Contributions: \$ _____
- d. Qual Tuition Prog. Contributions: \$ _____
- e. Tutoring: \$ _____

** Please submit all **Forms 1098-T** tuition statements from school, **1099-Q** distributions from Qualified Education Programs, **AND receipts for all items listed in section B** above. **