

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 _____
(If you were a 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 statement from school, 1099-Q distributions from Qualified Education Programs, AND receipts for all items listed in section B above. ****