

Education Expenses

Fill out one form for each student

Student's Name:

College/University Expense

College/University Name	Address	Federal Tax ID	Amount Paid

School Expenses Breakdown

Tuition \$ _____ Enrollment Fees \$ _____
Books \$ _____ Materials & Supplies \$ _____

Qualified Expenses Questionnaire

Did the student receive a Form 1098-T statement issued by an eligible educational institution with that institution's Employer Identification Number (EIN)? Yes No

The expenses paid entirely partially with:

tax-free scholarship grant employer-provided educational assistance
 VA benefits student loans

Has the student completed the first 4 years of post-secondary education? Yes No

Was the student convicted of a felony for possession or distribution of a controlled substance? Yes No

The student was enrolled in : 5 units or Less 6 units or more

Was the student enrolled in a program leading to a degree, certificate, or credential?

Yes No

The courses were part of a: degree program program to acquire or improve job skills

I, _____, solemnly swear that the information provided is true and I take full responsibility for any false information provided in preparation of my _____ tax return I provided all the information required to accurately complete my tax return to *Lopez & Associates Income Tax Services*. It is not my intent to provide any fraudulent information to the IRS or FTB. I understand that the failure to provide accurate information in this questionnaire may result in the imposition of accuracy-related or fraud penalties and interest charges.

Signature

Date