COLLEGE EXPENSE ORGANIZER

A) Annual Questions:  
Student’s First Name: _______________________

1. Number of postsecondary education years completed as of 1/1/18? _______________________
   (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. **