EDUCATIONAL EXPENSE RECORDER

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

1. Number of postsecondary education years completed as of 1/1/16? _____
   (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 paid to anyone other than college/university (online, other students, etc.) for:
   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. **