

**2024 College Students
(Complete A Separate Form for EACH Student)**

Tax Year _____ Client Name _____

Student Name _____

College Credits – For anyone listed on the tax return – If more than one, please let us know.

****IF You are a new client, please provide a copy of all tax years that have an education credit attached to them.**

Did you pay for college or post secondary education for yourself or a dependent?

Do you have a Form 1098-T from the college?

Did you have a 1098-T from a college in 2023?

Were you at least a Part-Time Student?

Can you provide the necessary Statement of Account for the year or for every quarter that is required

As per federal tax law? **This is required for your return.**

Did you receive any grants, scholarships or internships?

If yes, list all: _____

Form 1098-T's and Student Statement of Accounts can be retrieved from the student's college portal. Look in the financial section and/or the heading 'Tax Forms'. The account summary must be detailed with all charges and payments to the student's account.

Due to IRS regulations, we can no longer complete the Education Credits without the information listed in the above paragraph.

Remember: Required school supplies, ie. Books, CAD programs, Art Supplies, can also be used. Receipts must be attached to use these additional dollars towards the credits.

Has the Hope Scholarship Credit or American Opportunity Credit been claimed in past years?

If Yes, how many years have been claimed? _____

IF this information is not known, we may require previous year tax returns from parents and student.

Student Signature

Date

Attach Form 1098-T and Student Statement of Accounts to this Questionnaire.

Preparer Notes: