2021 Students Only

Tax Year _____ **Client Name** _____
Date _____ **Time** _____ **Drop Off / Interview**

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

Did you pay for college or post secondary education for yourself or a dependent? Yes / No
Do you have a Form 1098-T from the college? Yes / No
Did you have a 1098-T from a college in 2020? Yes / No
Were you at least a Part-Time Student? Yes / No
Can you provide the necessary Statement of Account for the year or for every quarter that is required
As per federal tax law? Yes / No
Did you receive any grants, scholarships or internships? Yes / No

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.

Has the Hope Scholarship Credit or American Opportunity Credit been claimed in past years?
Yes / No

How many years have been claimed? _____

Do you need to file a federal FAFSA form? Yes / No
We will help file FAFSA forms at a cost of $45 per student.

_____ _____ _____
Taxpayer Signature Spouse Signature Date