

EDUCATION WORKSHEET

EDUCATION CREDIT/DEDUCTION	YES	NO	COMMENTS
Did you receive an IRS letter disallowing or reducing any of the following credits?			
EIC = Earned Income Credit	<input type="checkbox"/>	<input type="checkbox"/>	
CTC = Child Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>	
ACTC = Additional Child Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>	
AOTC = American Opportunity Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>	
For any dependents between the ages of 18 and 24 in 2018, were they a full-time student (more than 1/2 time) for a part of at least 5 months during the year and pursuing a degree?	<input type="checkbox"/>	<input type="checkbox"/>	
If so, please list the school name and provide the Form 1098-T			<input type="text"/>
Has the student been convicted of a Federal or State felony class drug offense for possession or distribution?	<input type="checkbox"/>	<input type="checkbox"/>	
Did the student receive scholarships or grants?	<input type="checkbox"/>	<input type="checkbox"/>	
Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of 4 times?	<input type="checkbox"/>	<input type="checkbox"/>	
Number of years American Opportunity Credit has been taken			<input type="text"/>
Did the student complete the first 4 years of post secondary education before 2018?	<input type="checkbox"/>	<input type="checkbox"/>	
Did the student receive any distributions from a qualified tuition program (529 plan, Coverdell, etc.)? If so, provide the Form 1099-Q	<input type="checkbox"/>	<input type="checkbox"/>	
Amounts PAID in 2018 (paid means cash, check, credit card or funds borrowed that will need to be repaid; it does not mean scholarships).			
-Tuition & Fees PAID			<input type="text"/>
-Required Course Materials (Book & Supplies) PAID			<input type="text"/>