

CLIENT NAME:

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 2019, 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?

If so, please list the school name and provide the Form 1098-T

Has the student been convicted of a Federal or State felony class drug offense for possession or distribution? YES NO

Did the student receive scholarships or grants? YES NO

Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of 4 times? YES NO

Number of years American Opportunity Credit has been taken

Did the student complete the first 4 years of post secondary education before 2019? YES NO

Did the student receive any distributions from a qualified tuition program (529 plan, Coverdell, etc.)? If so, provide the Form 1099-Q YES NO

Amounts PAID in 2019 (paid means cash, check, credit card or funds borrowed that will need to be repaid; it does not mean scholarships).

-Tuition & Fees PAID

-Required Course Materials (Book & Supplies) PAID