

Educational Credits Questionnaire

We're sorry, but IRS requires that we have this information for EACH student

1. Student's name _____
(exactly as it appears on the student's social security card)

2. Name of the accredited institution(s) in which the student attended classes and has received a Form 1098-T (Form Required to claim these credits)

3. Was the student considered to be "at least a half-time student" for at least 5 months during calendar year 2017? (Box 8 on Form 1098-T is checked)
 Yes No

4. Has the student attended college any "4" previous calendar years? Yes No

5. How much was "PAID" by you either directly by check, from student loans, or from College Choice 529 to the institution(s) during calendar 2017?

Tuition and Fees (not Room & Board) \$ _____
(Form 1098-T Box 1 if filled in. Box 2 shows how much was billed, not what was paid?)

Books and Required Supplies \$ _____

6. Additional Information

Scholarships \$ _____
(Form 1098-T Box 5)

529 Distribution Earnings \$ _____
(Found on Form 1099-Q Box 2)

7. Is proof of the above listed payments available if IRS were to request it?
 Yes No

I have disclosed the above information to my income tax preparer to prepare my 2017 Tax Return and I further submit that this information is correct to the best of my knowledge and I can prove and produce records if requested.

Signature: _____ **Date:** _____ **Reviewed by** _____