

Education Credits and Deduction

Name: _____

SSN: _____

Provide all Form(s) 1098-T

Student's first and last name: _____ SSN: _____

Yes

Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of four times in any prior years?

Was the student enrolled at least half time for at least one academic period that began in 2019 at an eligible education institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary educational credential?

Did the student complete the first four years of post-secondary education before 2019?

Was the student convicted, before the end of 2019, of a felony for possession or distribution of a controlled substance?

Is the student pursuing a degree?

Number of years the American Opportunity Credit has been claimed for this student _____

	2019	2018
Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution	_____	_____
ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution	_____	_____
Tax-free education assistance received in 2019 allocable to the academic period	_____	_____
Tax-free education assistance received in 2020 (and before 2019 return is filed) allocable to the academic period	_____	_____
Refunds of qualified education expenses paid in 2019 if the refund is received before the 2019 return is filed	_____	_____

Educational Institution Name: _____

Educational Institution Name: _____

Student's first and last name: _____ SSN: _____

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