

Education Credits and Deduction

Name: _____

SSN: _____

Provide all Form(s) 1098-T

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

- Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of four times in any prior years? Yes
- Was the student enrolled at least half time for at least one academic period that began in 2020 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 2020?
- Was the student convicted, before the end of 2020, of a felony for possession or distribution of a controlled substance?
- Is the student pursuing a degree?

	2020	2019
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 2020 allocable to the academic period		
Tax-free education assistance received in 2021 (and before 2020 return is filed) allocable to the academic period		
Refunds of qualified education expenses paid in 2020 if the refund is received before the 2020 return is filed		

Educational Institution	EIN	_____
	Name	_____
	Street	_____
	City	_____ State _____ ZIP _____

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