

## Education Credits

Name: \_\_\_\_\_

### Provide all Form(s) 1098-T

Student's first and last name: \_\_\_\_\_

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 2023 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 2023?

Was the student convicted, before the end of 2023, 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 \_\_\_\_\_

	2023	2020
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 2023 allocable to the academic period		
Tax-free education assistance received in 2024 (and before 2023 return is filed) allocable to the academic period		
Refunds of qualified education expenses paid in 2023 if the refund is received before the 2023 return is filed		

	Yes	No
Did the student receive Form 1098-T from this institution for 2023?	<input type="checkbox"/>	<input type="checkbox"/>
Did the student receive Form 1098-T from this institution for 2022 with box 7 checked?	<input type="checkbox"/>	<input type="checkbox"/>

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	Yes	No
Did the student receive Form 1098-T from this institution for 2023?	<input type="checkbox"/>	<input type="checkbox"/>
Did the student receive Form 1098-T from this institution for 2022 with box 7 checked?	<input type="checkbox"/>	<input type="checkbox"/>