

Education Credits Organizer

Client Name _____ Date _____

Student and School Information

Student's Name		
School/College Name		
School/College EIN		
Address	Street	
	City, State, ZIP	

Did you receive a 1098-T from this institution? Y N

Education Related Expenses

Tuition		\$	
Books		\$	
Supplies		\$	
Equipment		\$	
Other		\$	
Other		\$	
Other		\$	
Other		\$	

Due Diligence

Has the Hope Scholarship or American Opportunity Credit been claimed for this student for a total of 4 times in any prior years? Y N

Was the student enrolled at least half-time for at least one academic period in a degree, certificate, or other post secondary credential program? Y N

Did the student complete the first 4 years of college before this year? Y N

Has the student been convicted of felony possession or distribution of a controlled substance? Y N