

Education Credits

2024 Tax Year

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 the current tax year 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 the end of the tax year?

Was the student convicted, before the end of the tax year, 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 _____

Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution 2024 2020

ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution _____

Tax-free education assistance received during the tax year allocable to the academic period _____

Tax-free education assistance received in 2025 (and before 2024 return is filed) allocable to the academic period _____

Refunds of qualified education expenses paid during the tax year if the refund is received before the current tax return is filed _____

Did the student receive Form 1098-T from this institution for 2024? Yes No

Did the student receive Form 1098-T from this institution for 2023 with box 7 checked?

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 the tax year 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 the end of the tax year?

Was the student convicted, before the end of the tax year, 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 _____

Total qualified education expenses (including the cost of books, supplies, and equipment) that were REQUIRED to be paid directly to the educational institution 2024 2020

ADDITIONAL qualified education expenses that were NOT required to be paid directly to the educational institution _____

Tax-free education assistance received during the tax year allocable to the academic period _____

Tax-free education assistance received in 2025 (and before 2024 return is filed) allocable to the academic period _____

Refunds of qualified education expenses paid during the tax year if the refund is received before the current tax return is filed _____

Did the student receive Form 1098-T from this institution for 2024? Yes No

Did the student receive Form 1098-T from this institution for 2023 with box 7 checked?