

EDUCATION CREDIT WORKSHEET	NAME <input style="width:95%;" type="text"/>	20
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<input type="checkbox"/>	<input type="checkbox"/>	Have you received the HOPE or American Opportunity Credits in 4 Prior Years?
		List the Years You Took The Credit _____, _____, _____, _____, [<input type="checkbox"/>]NONE
<input type="checkbox"/>	<input type="checkbox"/>	Were you enrolled at least 1/2 time for at least one academic period?
<input type="checkbox"/>	<input type="checkbox"/>	Were you in a program to earn a Degree or Certificate, etc.? <input style="width:200px;" type="text" value="Major"/>
<input type="checkbox"/>	<input type="checkbox"/>	Did you complete 1st 4 academic years Before this tax year?
Your Classification for the Fall Semester was Fr Soph Jr Sr Grad		
<input type="checkbox"/>	<input type="checkbox"/>	Have you been convicted of a Felony for possession or distrubution of a controlled substance?
		if so, provide the Date <input style="width:150px;" type="text"/>
IF YES, YOU DO NOT QUALIFY FOR AOTC--AMERICAN OPPORTUNITY TAX CREDIT		

	DONE
POVIDE ALL 1098-T'S FOR THE CURRENT YEAR	
NEW CLIENTS-PROVIDE 1098-T'S FOR THE PRIOR YEAR	
ALL CLEINTS, PROVIDE ACCOUNT STATEMENT FROM EACH SCHOOL	
BOOKS & Required Course Materials-AOTC Only - We have receipts for	\$ <input style="width:50px;" type="text"/>
SCHOLARSHIPS NOT REPORTED ON 1098-T -- Provide details	
EDUCATION PLAN DISTRIBUTIONS - 529 PLAN ETC. -- Provide Forms 1099-Q	
DEPENDENT STUDENT TAX FILING INFO, W-2'S ETC. - It is BEST if We prepare Student's Return	
PROVIDE A COPY OF STUDENT'S TAX RETURN IF THEY PREPARED THEIR OWN	

FOR CPA USE ONLY

[] AOTC [] LLC [] Tuition Deduction