

EDUCATION CREDIT WORKSHEET

STUDENT NAME

20

YES NO

Have you received the HOPE or American Opportunity Credits in 4 Prior Years?

List the Years You Took The Credit _____, _____, _____, _____, []NONE

Were you enrolled at least 1/2 time for at least one academic period?

Were you in a program to earn a Degree or Certificate, etc.?

Did you complete your 1st 4 Academic years Before this tax year?

Your Classification for the Fall Semester was Fr Soph Jr Sr Grad

Have you been convicted before the end of the year of a Felony for possession or distribution of a Controlled Substance?

IF YES, YOU DO NOT QUALIFY FOR AOTC--AMERICAN OPPORTUNITY TAX CREDIT

INFORMATION REQUIRED TO CALCULATE THE 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 - Provide Receipts. Total \$	
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