

2022 Education Tax Credit Questionnaire

Complete a separate form for each student for whom you are claiming any education tax credits

Taxpayer Name[s]: _____

Student Name: _____

Due to increased tax compliance requirements imposed on tax preparers, we are now required to obtain the information requested below with regards to any educational tax credits that you claim.

1. Did student complete 4 years of post-secondary education prior to 2022? ____Yes ____No
2. Was student enrolled at least half-time for at least one semester in 2022? ____Yes ____No
3. Was student ever convicted of a felony for possession or distribution of a controlled substance? ____Yes ____No
4. Have any tax credits been disallowed in a prior tax year? ____Yes ____No
5. Year in College [1st, 2nd, 3rd, 4th, 4+ _____ Pursuing Degree [BS/BA/Masters] _____
6. Did student receive any scholarships or grants from any source NOT reported on 1098-T? ____

School #1 _____	Full/Part Time _____
Tuition _____ Room & Board _____	Books/Supplies _____
School #2 _____	Full/Part Time _____
Tuition _____ Room & Board _____	Books/Supplies _____

Submit Form 1098-T from the school(s) you or your dependent child attended in 2022. You will not be able to claim an education credit if you do not have a properly completed Form 1098-T from the school(s). Note: The amounts reported on Form 1098-T may NOT be the amount that you can claim for purposes of the education tax credits.

If any of the education expenses were paid from **ANY** Education Savings Account or a Sec 529 Qualified Tuition Plan, attach Form 1099-Q from the plan, and a copy of the 2022 year-end account statement

Submit documentation showing tuition and related fees actually paid in or for 2022 for the attendance at the school of higher education. Documentation can include a payment summary or statement from the school, canceled checks, lender statement, etc. Note: 3rd party payments and student loan proceeds may count as payments made by you or the student.

Comments: _____

Sign _____	Date _____
Sign _____	Date _____