

2016 Educational Expenses Worksheet

Student Name: _____

School Name: _____

Did you receive a form 1098-T?	Yes	No
Did student complete the first 4 years of post secondary education?	Yes	No
Has the student claimed the American Opportunity Credit in the last 4 tax years?	Yes	No
Has the student claimed the Lifetime Learning Credit in the last 4 tax years?	Yes	No
Was the student enrolled at least half time for at least one academic period?	Yes	No
Has student been convicted of felony possession/distributing a controlled substance?	Yes	No
Did student obtain detailed payment transcript from school?	Yes	No
If yes, does info from payment transcript match what is reported on 1098-T?	Yes	No
Did student receive any scholarships?	Yes	No
Could your scholarship be used for room/board as well tuition?	Yes	No
Were there any §529 Plan distributions made to pay for education?	Yes	No

Tuition & School Required Purchases			Receipt Attached
Date	Description	Amount	
TOTAL			

Books & Education Supplies			Receipt Attached
Date	Description	Amount	
TOTAL			

Room and Board Expenses			Receipt Attached
Date	Description	Amount	
TOTAL			