College Information Worksheet

(Complete a separate worksheet for each student. You can copy this page or find this form on our website.)

Student's Name _____

Part I- Student Status

YES	NO	
☐	☐	Did this student receive Form(s) 1098-T, Tuition Statement? If **yes**, attach form(s).
☐	☐	Did student receive scholarships or other education assistance?
☐	☐	Was this student the beneficiary of a Qualified Tuition Program (also known as Section 529 Plan)?
☐	☐	Was this student the beneficiary of an Education Savings Account (ESA)?
☐	☐	Did this student receive Form(s) 1099-Q, Payments From Qualified Education Programs (under Sections 529 and 530)? If **yes**, attach form(s).
☐	☐	Did you cash U.S. savings bonds during 2020 to pay for this student's education?

Part II- College Student Information

YES	NO	
☐	☐	How many years of college (postsecondary) education had the student completed as of 1/1/2020? ☐ None ☐ One ☐ Two ☐ Three ☐ Four or more
☐	☐	Does the student have a high school diploma (or General Education Development credential)?
☐	☐	Was the student enrolled at an eligible education institution during 2020?
☐	☐	Did this student take at least one-half the normal full-time workload for one academic period?
☐	☐	Has this student been convicted of a felony for possessing or distributing controlled substance?

Other Expenses:

Books purchased from the school $ _____
Books purchased from an outside source $ _____

Besides the 1098-T for each institution, **please include a detailed student account report for the calendar year 2020**. This report will show all charges and payments received which will help determine the correct tuition deduction or credit.