

## 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

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did this student receive Form(s) 1098-T, Tuition Statement? If <b>yes</b> , attach form(s).   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did student receive scholarships or other education assistance?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Was this student the beneficiary of a Qualified Tuition Program (also known as Section 529 Plan)?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Was this student the beneficiary of an Education Savings Account (ESA)?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did this student receive Form(s) 1099-Q, Payments From Qualified Education Programs (under Sections 529 and 530)? If <b>yes</b> , attach form(s). |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash U.S. savings bonds during 2022 to pay for this student's education?  |

### Part II- College Student Information

YES    NO

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | How many years of college (postsecondary) education had the student completed as of <b>1/1/2022</b> ?<br><input type="checkbox"/> None <input type="checkbox"/> One <input type="checkbox"/> Two <input type="checkbox"/> Three <input type="checkbox"/> Four or more |
| <input type="checkbox"/> | <input type="checkbox"/> | Does the student have a high school diploma (or General Education Development credential)?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Was the student enrolled at an eligible education institution during 2022?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did this student take at least one-half the normal full-time workload for one academic period?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 2022.** This report will show all charges and payments received which will help determine the correct tuition deduction or credit.