

## 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 2024 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>1/1/2024</b> ? <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 2024?
<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 2024.** This report will show all charges and payments received which will help determine the correct tuition deduction or credit.