

EDUCATION WORKSHEET

CLIENT NAME:

EDUCATION CREDIT/DEDUCTION

YES NO COMMENTS

Did you receive an IRS letter disallowing or reducing any of the following credits?

EIC = Earned Income Credit

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CTC = Child Tax Credit

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ACTC = Additional Child Tax Credit

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AOTC = American Opportunity Tax Credit

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For any dependents between the ages of 18 and 24 in 2025, were they a full-time student (more than 1/2 time) for a part of at least 5 months during the year and pursuing a degree?

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If so, please list the school name and provide the Form 1098-T

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Has the student been convicted of a Federal or State felony class drug offense for possession or distribution?

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Did the student receive scholarships or grants?

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Has the Hope Scholarship Credit or American Opportunity Credit been claimed for this student for a total of 4 times?

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Number of years American Opportunity Credit has been taken

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Did the student complete the first 4 years of post secondary education before 2025?

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Did the student receive any distributions from a qualified tuition program (529 plan, Coverdell, etc.)? If so, provide the Form 1099-Q

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Amounts PAID in 2025 (paid means cash, check, credit card or funds borrowed that will need to be repaid; it does not mean scholarships).

-Tuition & Fees PAID

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-Required Course Materials (Book & Supplies) PAID

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