

TAXPAYER NAME

TAX YEAR

Where you or your spouse a **FULL-TIME student**?
If yes: For how many full or partial calendar months?

☐ YES ☐ NO

Did you make payments on a student loan for you or any dependent?

☐ YES ☐ NO

■ **If yes and you did not receive a 1098-E:** Go online or call your lender for the amount:

\$

If you or any child attended college for any part of 2022: We **MUST** have the student's **1098-T** from all schools **AND** **detailed account statements** showing **dates of charges and payments** covering the **entire calendar year**.

	Student's Name	School Name & Address	1098-T provided?	Acct statement provided?	Books receipts provided?
A			<input type="checkbox"/> YES	<input type="checkbox"/> YES	<input type="checkbox"/> YES
B			<input type="checkbox"/> YES	<input type="checkbox"/> YES	<input type="checkbox"/> YES
C			<input type="checkbox"/> YES	<input type="checkbox"/> YES	<input type="checkbox"/> YES

	Type of Program (BA, MS, Cert.,etc.)	Length of Program (Years)	Student's Rank at the end of 2022	Years of post-high school education completed	Outside scholarship received	529 statements provided?
A			Fr So Jr Sr Done		\$	<input type="checkbox"/> YES
B			Fr So Jr Sr Done		\$	<input type="checkbox"/> YES
C			Fr So Jr Sr Done		\$	<input type="checkbox"/> YES

† Freshman, sophomore, junior, senior, or graduated

I/we certify that I/we would like my taxes prepared according to the information provided above.

Taxpayer Signature _____ **Date** _____

Spouses Signature _____ **Date** _____