

**2023 College Students**  
**(Complete A Separate Form for EACH Student)**

Tax Year \_\_\_\_\_ Client Name \_\_\_\_\_

Student Name \_\_\_\_\_

**College Credits** – For anyone listed on the tax return – If more than one, please let us know.

**\*\*IF You are a new client, please provide a copy of all tax years that have an education credit attached to them.**

Did you pay for college or post secondary education for yourself or a dependent?	Yes	No
Do you have a <u>Form 1098-T</u> from the college?	Yes /	No
Did you have a 1098-T from a college in 2023?	Yes /	No
Were you at least a Part-Time Student?	Yes /	No
Can you provide the necessary Statement of Account for the year or for every quarter that is required		
As per federal tax law?	Yes /	No
Did you receive any grants, scholarships or internships?	Yes /	No

***Form 1098-T's and Student Statement of Accounts can be retrieved from the student's college portal. Look in the financial section and/or the heading 'Tax Forms'. The account summary must be detailed with all charges and payments to the student's account.***

***Due to IRS regulations, we can no longer complete the Education Credits without the information listed in the above paragraph.***

Remember: Required school supplies, ie. Books, CAD programs, Art Supplies, can also be used. Receipts must be attached to use these additional dollars towards the credits.

Has the Hope Scholarship Credit or American Opportunity Credit been claimed in past years?  
Yes / No

How many years have been claimed? \_\_\_\_\_

Do you need to file a federal FAFSA form? Yes / No  
*We will help file FAFSA forms at a cost of \$45 per student.*

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

**Attach Form 1098-T and Student Statement of Accounts to this Questionnaire.**