

COLLEGE TUITION

FOR 2023 TAX YEAR

Warning: Many IRS Audits are being conducted, because of this College Credit.

Keep Your Receipts for the following expenses:

Tuition, Books, Computer, and other supplies, out of their pocket, or loan.

We need the following information for each student.

BE AWARE: It is the taxpayer's responsibility to answer all these questions correctly, so take your time and be correct. It is not the responsibility of Monty's Tax Service to complete this form.

1. Name of Student: _____
2. Student's Social Security #: _____
3. Name of Education Institution: _____
4. Full Address of the Institution: _____

5. Did the student receive Form 1098-T from this institution for 2023? Yes _____ No _____
6. Did the student receive Form 1098-T from this institution for 2022? Yes _____ No _____
7. If YES in 5 & 6, enter the institution's EIN # from Form 1098-T: EIN# _____
8. Has the Hope Scholarship Credit or American Opportunity Credit been claimed for the student for any 4 prior years? Example: You claimed 2022, 2021, 2020, 2019 Yes _____ No _____
9. Was the student enrolled at least half-time for at least one academic period that began in 2023 at an eligible educational institution in a program leading towards a postsecondary degree, certificate, or other recognized postsecondary educational credential? Yes _____ No _____
10. Did the student complete the first 4 years of postsecondary education before 2022? Yes _____ No _____
11. Was the student convicted, before the end of 2022, of a felony for possession or distribution of a controlled substance? Yes _____ No _____

Signed Name: _____ **Date:** _____

Printed Name: _____ **Date:** _____