

EDUCATION EXPENSES

The American Recovery and Reinvestment Act of 2009 created the American Opportunity credit as a replacement for the Hope credit. Students that have not completed their first four years of post-secondary education before the beginning of 2009 qualify for this credit. The Hope credit has been retained, but applies only to taxpayer's claiming benefits associated with student(s) who attended an institution in a Midwest disaster area.

STUDENT INFORMATION

Name: _____

Social Security Number: _____

Number of years Hope credit claimed: _____

Did Student complete first 4 years of post-secondary education before 2009? _____

Did student attend educational institution in Midwest disaster area? _____

CURRENT YEAR EXPENSES

Qualified tuition and fees: _____

Course related materials required to be purchased from school: _____

Course related materials not entered above (American Opportunity Credit, Midwestern disaster): _____

Reasonable costs for room and board (Midwestern disaster only): _____

Expenses of a special needs student (Midwestern disaster only): _____

REIMBURSEMENTS

Scholarship and/or Grant amount: _____

Employer Reimbursement amount: _____

PLEASE PROVIDE FORM 1098-T FROM SCHOOL