



Taxpayer & Spouse: _____

EDUCATION INFORMATION – MODULE 5

Please provide the information requested below. Please circle the applicable response where available in this document. If the question does not pertain to you, please mark N/A. Unless indicated, all questions pertain to the _____ tax year. Please use separate sheets if more space is needed.

1. Did you, your spouse, or your dependent pay for tuition, fees (that must be paid yes/no/na as a condition of enrollment or attendance), or related expenses (books, supplies, and equipment needed for a course of study, etc., but excluding personal expenses such as room and board, insurance, medical expenses, or transportation expenses) during the tax year, or within three months after the end of the tax year, as a condition to attending an accredited, post-secondary school (college, university, or vocational school)?

a. If yes, was the student you, your spouse, or one of your dependents? If yes, please specify and provide responses to the following questions for each student.

i. If the student is someone other than you (or your spouse for joint returns) did anyone other than you claim the student as a dependent yes/no/na for the year with respect to which this form is being completed?

ii. Was the student enrolled in one or more courses during the year at yes/no/na the school?

A. If yes, provide a copy of Forms 1098-T received.

1. Was the student enrolled in the educational institution yes/no/na for any of the following reasons: (1) to earn a post-secondary degree (post-high school degree); (2) to maintain or improve skills required at their job; or (3) because it is required by the student’s employer or the law to keep his or her salary, status or job and the requirement serves a business purpose? Please specify which categories apply.

B. If yes, and related expenses (i.e. books, supplies, etc.) were paid, provide proof that the expense was necessary (e.g. a course syllabus), and proof that the expense was paid (e.g. bank statement, cancelled check, receipt, etc.).

iii. If yes, had the student completed the first four years of his or her yes/no/na

post-secondary education at the beginning of the tax year?

- iv. If yes, was the student enrolled in a program that leads or has led to a degree, certificate, or other recognized educational credential for at least one academic period (semester, quarter, etc.) during the tax year?

A. If yes, explain.

- v. If yes, did the student carry credits equal to at least one half the normal workload for full time students in his or her course of study?

- vi. If yes, was the student convicted of possession or distribution of a controlled substance or other crime on or before the last day of the last day of the tax year?

- vii. Did the student receive any scholarships, grants, etc.? yes/no/na

- 2. Has any credit associated with the student's education been claimed in any four years prior to the tax year? yes/no/na

CERTIFICATION

The undersigned certifies, under the penalties of perjury, that the information provided in response to the foregoing questions is complete and accurate to the best of his or her knowledge. The undersigned further certifies that he or she has provided the information requested herein. The undersigned also certifies that he or she has verified the information provided in this document and states that it comports with the supporting documentation provided, if any.

Taxpayer's Signature

Spouse's Signature

Taxpayer's Printed Name

Spouse's Printed Name

Dated:

Dated: