

Have You or Someone in Your Family Incurred College Expenses?

Client Name: _____

If you or someone in your family has incurred post-secondary educational expenses this year please provide the following information:

Student's First and Last Name: _____

Relationship: _____

Student's First and Last Name: _____

Relationship: _____

Tuition Expense

Was any of the tuition paid with funds withdrawn from an educational 529 plan? Yes No

*If you answered **yes** to the above question, please submit all current year **1099-Q** forms, Payments from Qualified Education Programs with your current year tax paperwork.*

Please provide the following information below. To possibly claim a tax credit for tuition and education expenses, you must provide all the following information below **AND** the current year **1098-T** tax form from the school. Generally, the **1098-T forms are not mailed**, students often need to download the tax forms via their student login provided through the college or university.

Student Name	Institution	Grade/Level	Amount Paid	Date Paid