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# Qualified Education Expense Organizer

Please Bring Copies of all Form 1098-T's

Name of Student:	SS#:	
Was this person a student during 2016?	Yes	No
What kind of school did the student attend during 2016?	<input type="checkbox"/> High School (Secondary) <input type="checkbox"/> College (Postsecondary) <input type="checkbox"/> Military Academy <input type="checkbox"/> Vocational School <input type="checkbox"/> N/A	
Did the Student complete the first 4 years of postsecondary education as of 1/1/2016?	Yes	No
Was this Student enrolled at an eligible education institution during 2016?	Yes	No
Was this student enrolled in a program that leads to a degree, certificate, or credential?	Yes	No
Was this student taking courses as part of a postsecondary degree program or to acquire or improve job skills?	Yes	No
Did this student take at least one-half the normal full-time workload for one academic period?	Yes	No
Has this student been convicted of a felony for possessing or disturbing a controlled substance?	Yes	No
Is this student an eligible dependent of the taxpayer?	Yes	No
In how many prior years has an American Opportunity Credit been claimed for this student?		
In how many prior years has a Hope Credit been claimed for this student?		

**Education Expenses:**

Fees	\$
Books, Supplies, Equipment (Paid to the Institution)	\$
Books, Supplies, Equipment	\$
Other course-related	\$
Room and Board	\$
Special Needs Expenses	\$
Computer Expenses (computers, tablets, software, etc.)	\$
Uniforms	\$
Transportation	\$
Refunds	\$
Tax-free assistance	\$
Deducted on Schedule A	\$
Used for credit or deductions	\$
Used for exclusion	\$