

Please complete the information below if you **aid** qualified education expenses in the prior tax year for you, your spouse, or your dependents enrolled in an accredited postsecondary institution. Last year's amounts are provided for your reference.

### STUDENT INFORMATION

1=taxpayer, 2=spouse.....

First name.....

Last name.....

Social security number.....

Number of years hope credit claimed.....

Number of prior years AOC claimed.....

1=student completed first four years of post-secondary education before tax year.....  
1=student was convicted, before the end of tax year, of a felony for possession or distribution of a controlled substance.....


### EDUCATIONAL INSTITUTION ATTENDED (#1)

Name.....

Street address .....

City.....

State.....

ZIP code .....

Federal ID number from Form 1098-T .....


### EDUCATIONAL INSTITUTION ATTENDED (#2)

Name.....

Street address .....

City.....

State.....

ZIP code .....

Federal ID number from Form 1098-T .....


### QUALIFIED EDUCATION EXPENSES

20\_\_ Amount


Qualified tuition & fees paid in tax year (net of refund or assistance, & not entered elsewhere).....

Books & supplies required to be purchased from institution .....

Books & supplies not entered above .....

Amount of prior year refund or assistance \* .....

\* Refund of qualified expenses and tax-free educational assistance received after you file your return for the year in which the expenses were paid.

Please enter all pertinent amounts and attach all 1099-Q forms.  
 Enter qualified education expenses below that are not entered elsewhere.  
 Last year's amounts are provided for your reference.

## ESA'S AND QTP'S (Form 1099-Q)

20    Amount

No. <input type="text"/>	Name of payer.....	
	1=spouse.....	
	Qualified expenses:	
	Higher education (net of nontaxable benefits) .....	
	Elementary & secondary education (net of nontaxable benefits) .....	
	Form 1099-Q:	
	Gross distributions (Box 1).....	
	Earnings (Box 2).....	
	Basis (Box 3).....	
	Rollover: 1=nontaxable, 2=taxable (Box 4) .....	
Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) .....		
ESA's only:		

No. <input type="text"/>	Name of payer.....	
	1=spouse.....	
	Qualified expenses:	
	Higher education (net of nontaxable benefits) .....	
	Elementary & secondary education (net of nontaxable benefits) .....	
	Form 1099-Q:	
	Gross distributions (Box 1).....	
	Earnings (Box 2).....	
	Basis (Box 3).....	
	Rollover: 1=nontaxable, 2=taxable (Box 4) .....	
Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) .....		
ESA's only:		

No. <input type="text"/>	Name of payer.....	
	1=spouse.....	
	Qualified expenses:	
	Higher education (net of nontaxable benefits) .....	
	Elementary & secondary education (net of nontaxable benefits) .....	
	Form 1099-Q:	
	Gross distributions (Box 1).....	
	Earnings (Box 2).....	
	Basis (Box 3).....	
	Rollover: 1=nontaxable, 2=taxable (Box 4) .....	
Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) .....		
ESA's only:		