

# Goodwill NCW Valet VITA

## Supplemental Questions: Education Expenses

### For Tax Year \_\_\_\_\_

Name of Student: \_\_\_\_\_

1. We will need the following items for the student's education expenses:
  - 1098-T from each education institution
  - Statement of Activity which shows all tuition charged and payments made that corresponds with the 1098-T totals. You may need to include prior year in account activity search in order to match the 1098-T totals.
  - Cost for Required Books (with receipts) \$ \_\_\_\_\_
  
2. If education expenses are for your dependent child, we will need the following:
  - If your child already filed his/her tax return, we will need a copy of their return.
  - If your child has not filed their tax return yet, then we will need to file their return in conjunction with your return. They will need to complete the intake forms as well as attend the drop-off, quality review and pick-up appointments.
  
3. Did the student receive a 1098-T from the institution with Box 2 filled and Box 7 checked? Note: Box 2 was eliminated in 2018, so the answer should be "No" for all tax years except if processing 2018 and checking a 2017 1098-T.
  - Yes
  - No
  
4. Has the student claimed the Hope Scholarship Credit or American Opportunity Credit on four prior tax returns?
  - Yes
  - No
  
5. Was the student at least half-time during the tax year (See 1098-T Box 8)? If you feel there is an error regarding your 1098-T half-time status, please contact the educational institution for a clarification/correction.
  - Yes
  - No
  
6. Did the student complete the first four years of post-secondary education before the end of the preceding tax year?
  - Yes
  - No
  
7. Was the student convicted, before the end of the tax year, of a felony for possession or distribution of a controlled substance?
  - Yes
  - No