

# Education Credit Questionnaire-Tax Payer or Spouse:

**Client Name:**

**Tax Year:**

**Please answer the following questions to the best of your knowledge in relation to yourself or your spouse that attended college**

1. What college do you attend?

2. Did you receive any scholarships not reported on your 1098-T? If so, how much?

3. Did you withdraw/drop any classes during the year?

4. Please provide the following expenses related to your college student, including what was reported on the 1098-T:

Tuition

Books

Room & Board

Computer/Supplies

5. How many credit hours did you take for each of the following semesters?

Spring \_\_\_\_\_

Summer \_\_\_\_\_

Fall \_\_\_\_\_

**Name**

**Date**