

EDUCATIONAL EXPENSES FOR 2023

Student's Name: _____

Circle your answer:

- YES/ NO Was the student enrolled at least half-time for at least one academic period that began in 2023 at an eligible educational institution in a program leading toward a post-secondary degree, certificate, or other recognized post-secondary education credential?
- YES/ NO Did the student complete the first 4 years of post-secondary education before 2023?
- YES/ NO Was the student convicted any time before the end of 2023 of a felony for possession or distribution of a controlled substance?
- YES/ NO Is the student pursuing a degree?
- YES/ NO Was a 1098-T received from the college? (All must be provided)
- YES/ NO Did you print out a copy of the student's statement of account from the college? **(This MUST be provided – and it must include dates of all billings and payments from December 2022 to January 2024)**
- YES/ NO Was a credit or refund issued during 2023 by the educational institution? (Provide details)
- YES/ NO Were any refunded amounts during 2023 originally paid by using a 529 account? (Provide details)

PLEASE COMPLETE THE FOLLOWING INFORMATION:

2023 Refunds or Credits (Remote Learning/Pandemic related):	AMOUNTS:
Amount of refunded tuition charges during 2023	\$
Amount of refunded room & board charges during 2023	\$
2023 Qualified Educational Expenses:	
Tuition (per 1098-T)	\$
Tuition charged in 2023 per student's statement of account	\$
Books, Supplies & Equipment required to be paid to the school	\$
Books, supplies & equipment not purchased from the school	\$
Payments of Educational Expenses made via:	
Financial Aid	\$
Scholarships & Grants (school awarded & privately obtained)	\$
529 plan payment (used for tuition, books & supplies)	\$
Parent and Student Payments (check, cash, credit card)	\$
Student Loan Borrowing	\$
Other: please specify	\$
529 Distribution used for room, board & travel (not tuition)	\$