



Family TAX OFFICE

Education Expense Checklist

Student name _____ How many schools do you attend? _____

Are you a dependent on someone else's return?

Have you or anyone else (if you were or are their dependent) taken education credits in a prior year?

Have you received a four year degree? _____ Are you a candidate for a degree? _____

Are you at least a half time to full time student?

Have you ever been convicted of a felony drug charge?

Please log on to your school student portal to retrieve your 1098-T tax form, you can print it and bring a copy or pdf attach it and email it to us.

Did you pay for out of pocket costs for the following? Books \$ _____ Parking \$ _____

Any materials necessary for a specific class *\$ _____

***i.e. if you took a drafting class and were required to purchase a drafting board or a math class that required a scientific calculator etc.**

If you received ALL scholarship or grant funding, you may not have been issued a 1098-T check with your educational intuition.

If you receive scholarships or grants that help you cover costs other than education costs, such as living expenses, please indicate how much of the scholarship/grant was used for education fees \$ _____

How much was used for education expenses \$ _____

If you have already graduated and are paying student loan interest, please provide us your 1098E Student Loan Interest paid tax form.

Questions

(760) 870-4441 text (858) 301-6100 office (760) 870-7770 fax
14231 Garden Rd Suite 11 Poway Ca 92064
www.FamilyTaxOffice.com