

Complete this section if you paid interest on a qualified student loan in 2023 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan. Please provide all copies of Form 1098-E. Form 1098-E from the lender reports interest received in 2023. The amounts reported by the lender may differ from the amounts you actually paid.

TS	Qualified loan interest recipient/lender	+	2023 Interest Paid	[1]	Prior Year Information
—	_____	+	_____	[1]	<div style="background-color: #cccccc; border: 1px solid black; padding: 2px;"> _____ _____ _____ _____ </div>
—	_____	+	_____	[1]	
—	_____	+	_____	[1]	
—	_____	+	_____	[1]	

NOTES/QUESTIONS:

Education Credits and Tuition and Fees Deduction

Please provide all copies of Form 1098-T.

Educational institutions use Form 1098-T to report qualified education expenses. An eligible educational institution is any college, university, or vocational school eligible to participate in a student aid program administered by the U.S. Department of Education.

Preparer - Enter on Screen Educate2

Taxpayer/Spouse (T, S) _____ [8]
 Education code (1=American Opportunity Credit, 2=Lifetime Learning Credit) _____
 Student's social security number _____
 Student's first name _____
 Student's last name _____

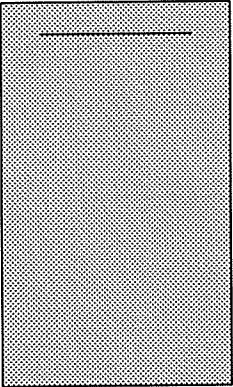
Institution Information

Enter information from each institution on a separate page, including the complete address and federal identification number of the institution.

Institution's federal identification number _____ [8]
 Institution's name _____
 Institution's street address _____
 Institution's city, state, zip code _____

Tuition Paid and Related Information

Amounts reported in Box 1 may not reflect the actual amount paid for the student during 2023. Enter the amount actually paid during 2023.

	2023 Information	Prior Year Information
Tuition paid (Enter only the amount actually paid) (Box 1)	+ _____ [8]	
Educational institution changed its reporting method for 2023 (Box 3)	_____	
Adjustments made for a prior year (Box 4)	_____	
Scholarships or grants (Box 5)	_____	
Adjustments to scholarships or grants for a prior year (Box 6)	_____	
Box 1 or 2 includes amounts for an academic period beginning January - March 2024 (Box 7)	_____	
At least half-time student (Box 8)	_____	
Graduate student (Box 9) (1=Yes, 2=No)	_____	
Insurance contract reimbursement/refund (Box 10)	_____	
Non-Institution expenses (Books and fees not paid directly to the educational institution)	_____	
American Opportunity Tax Credit (AOTC) disqualifier	_____	
1 = Not pursuing degree, 2 = Not enrolled at least half-time, 3 = Felony drug conviction, 4 = 4 yrs post-secondary education before 2023		

NOTES/QUESTIONS:

Qualified Education Programs
Please provide all copies of Form 1099Q

Taxpayer/Spouse (T, S) _____ [1]
 Payer name _____ [3]
 State postal code _____ [4]
 Type of account (1= Private QTP, 2 = State QTP, 3 = ESA) _____ [6]
 Relationship to account (1 = Beneficiary, 2 = Account owner, 3 = Both, 4 = Neither) _____ [7]
 Final distribution _____ [8]

Contributions and Basis

Beneficiary's Information (if not taxpayer or spouse)

Social security number _____ [11]
 First name _____ [12]
 Last name _____ [13]

2023 Information

Prior Year Information

Amount contributed in current year + _____ [14]
 Basis of this account at 12/31/22 + _____ [17]
 Value of this account at 12/31/23 + _____ [19]
 Distribution by beneficiary of previously taxed contributions (if not taxpayer or spouse) + _____ [24]

Payments from Qualified Education Programs

2023 Information

Prior Year Information

Gross distribution (Box 1) + _____ [30]
 Earnings (Box 2) + _____ [32]
 Basis (Box 3) + _____ [34]
 Trustee-to-trustee rollover (Box 4) _____ [36]
 Trustee-to-trustee rollover amount if different than Box 1 + _____ [37]
Box 5 -
 Private QTP _____ [39]
 State QTP _____ [40]
 Coverdell ESA _____ [41]
 Check if the recipient is not the designated beneficiary (Box 6) _____ [42]
 Qualified education expenses + _____ [43]
 Elementary and secondary education expenses + _____ [45]

NOTES/QUESTIONS: