



Books by Kelly, LLC
 2018 Tax Organizer
 Student Information Worksheet

Name of Student: _____

What kind of school did the student attend during 2018? (Check all that apply)

- | | | |
|--|--|---|
| <input type="checkbox"/> Elementary | <input type="checkbox"/> College (Postsecondary) | <input type="checkbox"/> Military Academy |
| <input type="checkbox"/> High School (Secondary) | <input type="checkbox"/> Vocational School | <input type="checkbox"/> Not Applicable |

1. Did the student complete the first 4 years of postsecondary education as of 01/01/2018? Yes No NA
2. Was this student enrolled in a program that leads to a degree, certificate, or credential? Yes No NA
3. Was this student taking courses as part of a postsecondary degree program or to acquire or improve job skills? Yes No NA
4. Did this student take at least one-half the normal full-time workload for one academic period? Yes No NA
5. Has this student been convicted of a felony for possessing or distributing a controlled substance? Yes No NA
6. In how many prior years has an American Opportunity Credit been claimed for this student? _____
7. In how many prior years has a Hope Credit been claimed for this student? _____

Education Assistance (Scholarships, Fellowships, Grants, Etc)

1. Veteran's Educational Assistance: _____
2. Tax-free Employer-Provided Assistance: _____
- Scholarships, fellowships and grants (do not include scholarships reported on Form W2)**
3. Scholarships reported on Form(s) 1098-T: _____
4. Scholarships not reported on Form(s) 1098-T: _____
5. Fellowships: _____
6. Fulbright Grant: _____
7. Pell Grant: _____
8. Other Grants: _____
9. Amount for teaching, research or other services: _____
10. Amount required to be used for other than qualified education expenses: _____



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Name of Student: _____

Education Expenses

- 1. Tuition, etc reported on Form(s) 1098-T: _____
- 2. Tuition not reported on Form(s) 1098-T: _____

Paid to institution as a CONDITION OF ENROLLMENT:

- 3. Fees: _____
- 4. Books: _____
- 5. Supplies: _____
- 6. Equipment _____

Paid to other than institution or not a condition of enrollment:

- 7. Books: _____
- 8. Supplies: _____
- 9. Other Course-Related Materials: _____
- 10. Internet Access: _____
- 11. Computer Hardware: _____
- 12. Computer Software: _____
- 13. Academic Tutoring: _____
- 14. Room & Board: _____

**You are required to include financial transcripts
from the school(s) for the CALENDAR year.**