Student Loan Interest Paid

Complete this section if you paid interest on a qualified student loan in 2013 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 2013. The amounts reported by the lender may differ from the amounts you actually paid.

TS	Qualified loan interest recipient/lender	2013 Interest Paid	Prior Year Information
		+ [1]	
		+	
		+	
		+	

NOTES/QUESTIONS:

	Control Totals +		Form ID: Educate2

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, 3 = Tuition and Fees Deduction) __
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 or Box 2 may not reflect the actual amount paid for the student during 2013.
Enter the amount actually paid during 2013.

	2013 Information	Prior Year Information
Tuition paid (Enter only the amount actually paid) **(Box 1)**	+ ________[8]	________
Tuition billed (Enter only the amount actually paid) **(Box 2)**	________	
Educational institution changed its reporting method for 2013 **(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 2014 **(Box 7)**	__	
At least half-time student **(Box 8)**	__	
Graduate student **(Box 9)**	__	
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 2013	__	

NOTES/QUESTIONS:

Federal Student Aid Application Information #1

Complete a FAFSA information section for both the parent and student. Both may be required to complete the FAFSA.
If the parent or student tax return was prepared elsewhere, please provide the completed tax return.

This FAFSA information is for the: ______ **Preparer use only**

		2013 Information	Prior Year Information
Who is listed as the primary taxpayer on the tax return of the individual to whom this information applies? (1 = Father or stepfather, 2 = Mother or stepmother, 3 = Student, 4 = Student's spouse)		__[1]	
The information for the FAFSA worksheet will be: (1 = Calculated for the taxpayer on this return, 2 = Entered from someone else's return)		__[2]	
Taxpayer's (and spouse's) total current balance of cash, savings and checking accounts	+	[4]	
Taxpayer's (and spouse's) net worth in investments, including real estate but do not include the primary residence	+	[6]	
Taxpayer's (and spouse's) net worth in current businesses and/or investment farms	+	[8]	
Child support paid because of divorce, separation, or a result of a legal requirement	+	[10]	
Taxable earnings from need-based employment programs	+	[12]	
Student grant and scholarship aid included in adjusted gross income	+	[14]	
Earnings from work under a cooperative education program offered by a college	+	[16]	
Child support received but do not include foster care or adoption payments	+	[18]	
Veterans noneducation benefits	+	[20]	
Other untaxed income not reported elsewhere, such as worker's compensation, disability, etc., but do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, SSI, on-base military housing or a military housing allowance, or combat pay.	+	[22]	
Money received or paid on behalf of the student (For the student's worksheet only)	+	[24]	

	Control Totals +	

Federal Student Aid Application Information #2

This FAFSA information is for the: ______ **Preparer use only**

		2013 Information	Prior Year Information
Who is listed as the primary taxpayer on the tax return of the individual to whom this information applies? (1 = Father or stepfather, 2 = Mother or stepmother, 3 = Student, 4 = Student's spouse)		__[1]	
The information for the FAFSA worksheet will be: (1 = Calculated for the taxpayer on this return, 2 = Entered from someone else's return)		__[2]	
Taxpayer's (and spouse's) total current balance of cash, savings and checking accounts	+	[4]	
Taxpayer's (and spouse's) net worth in investments, including real estate but do not include the primary residence	+	[6]	
Taxpayer's (and spouse's) net worth in current businesses and/or investment farms	+	[8]	
Child support paid because of divorce, separation, or a result of a legal requirement	+	[10]	
Taxable earnings from need-based employment programs	+	[12]	
Student grant and scholarship aid included in adjusted gross income	+	[14]	
Earnings from work under a cooperative education program offered by a college	+	[16]	
Child support received but do not include foster care or adoption payments	+	[18]	
Veterans noneducation benefits	+	[20]	
Other untaxed income not reported elsewhere, such as worker's compensation, disability, etc., but do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, SSI, on-base military housing or a military housing allowance, or combat pay.	+	[22]	
Money received or paid on behalf of the student (For the student's worksheet only)	+	[24]	

NOTES/QUESTIONS: