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MERYL B. GREENWALD, CPA MARVIN GREENWALD (1935-2013)

Fill out this form if you, your spouse, or any of your dependents have college expenses, OTHERWISE SKIP!

AMERICAN OPPORTUNITY TAX CREDIT (AOTC) VERIFICATION (College Credits)

Taxpayer's Name: _____

Spouse's Name:

Students

	1	1	1
Name:			
Was this student listed as a dependent on	□ Yes	□ Yes	\Box Yes
anyone else's tax return or did they claim	□ No	□ No	□ No
themself?			
Were qualified expenses paid in 2023 for	□ Yes	□ Yes	□ Yes
academic periods beginning in 2023 or the	🗆 No	□ No	□ No
first 3 months of 2024?			
Were these education expenses used to claim	□ Yes	□ Yes	□ Yes
a deduction, another credit, or exclusion from	🗆 No	🗆 No	🗆 No
income?			
If any of these expenses were paid with a tax-			
free scholarship, grant, VA benefits, or by an	\$	\$	\$
employer, enter the amount received.			
If you are a new client, how many years has			
the AOTC already been taken?			
	1	1	1

Please provide Financial Transcripts showing amounts paid and when they were paid.

Please provide 1098T. If student loan interest was paid provide form 1098E.

If your situation is unique, or there's something else we should know, please detail here:

By signing this document, you are acknowledging that you can provide documentation to substantiate your eligibility for the credit being claimed on this return.

Taxpayer:

Spouse: Date: