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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	
Name:			
Was this student listed as a dependent on anyone else's tax return or did they claim themself?	□ Yes □ No	□ Yes □ No	□ Yes □ No
Were qualified expenses paid in 2024 for academic periods beginning in 2024 or the first 3 months of 2025?	□ Yes □ No	□ Yes □ No	□ Yes □ No
Were these education expenses used to claim a deduction, another credit, or exclusion from income?	□ Yes □ No	□ Yes □ No	□ Yes □ No
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?			
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: Spo	ouse:		Date: