

3131



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PAYER'S/TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1 Gross distribution	OMB No. 1545-1760	<b>Payments From Qualified Education Programs (Under Sections 529 and 530)</b>
		\$	Form <b>1099-Q</b>	
		2 Earnings	(Rev. April 2025)	
		\$	For calendar year _____	
PAYER'S/TRUSTEE'S TIN	RECIPIENT'S TIN	3 Basis	4 Type of transfer:	<b>Copy A For Internal Revenue Service Center</b>  For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the <b>General Instructions for Certain Information Returns.</b>  <a href="http://www.irs.gov/Form1099">www.irs.gov/Form1099</a>
		\$	a <input type="checkbox"/> Trustee-to-trustee b <input type="checkbox"/> QTP to Roth IRA	
RECIPIENT'S name		5 Distribution is from:	6 Check if the recipient is not the designated beneficiary <input type="checkbox"/>	
Street address (including apt. no.)		a <input type="checkbox"/> Private QTP b <input type="checkbox"/> State QTP c <input type="checkbox"/> Coverdell ESA		
City or town, state or province, country, and ZIP or foreign postal code				
Account number (see instructions)				

Form **1099-Q** (Rev. 4-2025)

Cat. No. 32223J

[www.irs.gov/Form1099Q](http://www.irs.gov/Form1099Q)

Department of the Treasury - Internal Revenue Service

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FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number		1 Payments received for qualified tuition and related expenses	OMB No. 1545-1574  <b>2025</b>  Form <b>1098-T</b>
		2	
FILER'S employer identification no.	STUDENT'S TIN <input type="checkbox"/>	3	
STUDENT'S name		4 Adjustments made for a prior year	5 Scholarships or grants
Street address (including apt. no.)		\$	\$
City or town, state or province, country, and ZIP or foreign postal code		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January–March 2026 <input type="checkbox"/>
Service Provider/Acct. No. (see instr.)	8 Checked if at least half-time student <input type="checkbox"/>	9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund \$

# Tuition Statement

## Copy A For Internal Revenue Service Center

For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the **General Instructions for Certain Information Returns.**  
[www.irs.gov/Form1099](http://www.irs.gov/Form1099)

Form **1098-T**

Cat. No. 25087J

[www.irs.gov/Form1098T](http://www.irs.gov/Form1098T)

Department of the Treasury - Internal Revenue Service

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RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.				OMB No. 1545-1380	
				Form <b>1098</b>	
				(Rev. April 2025)	
				For calendar year _____	
		1 Mortgage interest received from payer(s)/borrower(s)		<b>Copy A</b> <b>For Internal Revenue Service Center</b>  For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the <b>General Instructions for Certain Information Returns.</b>  <a href="http://www.irs.gov/Form1099">www.irs.gov/Form1099</a>	
		\$			
RECIPIENT'S/LENDER'S TIN	PAYER'S/BORROWER'S TIN	2 Outstanding mortgage principal	3 Mortgage origination date		
		\$			
		4 Refund of overpaid interest	5 Mortgage insurance premiums		
PAYER'S/BORROWER'S name		\$	\$		
		6 Points paid on purchase of principal residence			
		\$			
Street address (including apt. no.)		7 <input type="checkbox"/> If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, check the box, or enter the address or description in box 8.			
City or town, state or province, country, and ZIP or foreign postal code		8 Address or description of property securing mortgage (see instructions)			
9 Number of properties securing the mortgage	10 Other				
Account number (see instructions)					
				11 Mortgage acquisition date	

Form **1098** (Rev. 4-2025)

Cat. No. 14402K

[www.irs.gov/Form1098](http://www.irs.gov/Form1098)

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PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1a Total ordinary dividends		OMB No. 1545-0110	
		\$		Form 1099-DIV	
		1b Qualified dividends		(Rev. January 2024)	
		\$		For calendar year	
		2a Total capital gain distr.		2b Unrecap. Sec. 1250 gain	
		\$		\$	
PAYER'S TIN	RECIPIENT'S TIN	2c Section 1202 gain		2d Collectibles (28%) gain	
		\$		\$	
		2e Section 897 ordinary dividends		2f Section 897 capital gain	
		\$		\$	
RECIPIENT'S name		3 Nondividend distributions		4 Federal income tax withheld	
		\$		\$	
Street address (including apt. no.)		5 Section 199A dividends		6 Investment expenses	
		\$		\$	
City or town, state or province, country, and ZIP or foreign postal code		7 Foreign tax paid		8 Foreign country or U.S. possession	
		\$			
		9 Cash liquidation distributions		10 Noncash liquidation distributions	
		\$		\$	
		11 FATCA filing requirement		12 Exempt-interest dividends	
		<input type="checkbox"/>		\$	
Account number (see instructions)		2nd TIN not.		13 Specified private activity bond interest dividends	
		<input type="checkbox"/>		\$	
		14 State		15 State identification no.	
				16 State tax withheld	
				\$	
				\$	

Dividends and Distributions

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File with Form 1096.

For Privacy Act  
and Paperwork  
Reduction Act  
Notice, see the  
current General  
Instructions for  
Certain  
Information  
Returns.

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PAYER'S/TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1 Gross distribution	OMB No. 1545-1760	<b>Payments From Qualified Education Programs (Under Sections 529 and 530)</b>
		\$	Form <b>1099-Q</b>	
		2 Earnings	(Rev. April 2025)	
		\$	For calendar year	
PAYER'S/TRUSTEE'S TIN	RECIPIENT'S TIN	3 Basis	4 Type of transfer:	<b>Copy A For Internal Revenue Service Center</b>  For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the <b>General Instructions for Certain Information Returns.</b>  <a href="http://www.irs.gov/Form1099">www.irs.gov/Form1099</a>
		\$	a <input type="checkbox"/> Trustee-to-trustee b <input type="checkbox"/> QTP to Roth IRA	
RECIPIENT'S name		5 Distribution is from:	6 Check if the recipient is not the designated beneficiary <input type="checkbox"/>	
Street address (including apt. no.)		a <input type="checkbox"/> Private QTP b <input type="checkbox"/> State QTP c <input type="checkbox"/> Coverdell ESA		
City or town, state or province, country, and ZIP or foreign postal code				
Account number (see instructions)				

Form **1099-Q** (Rev. 4-2025)

Cat. No. 32223J

[www.irs.gov/Form1099Q](http://www.irs.gov/Form1099Q)

Department of the Treasury - Internal Revenue Service

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☐ VOID☐ CORRECTED**Mortgage  
Interest  
Statement**

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.				OMB No. 1545-1380	
				Form <b>1098</b>	
				(Rev. April 2025)	
				For calendar year _____	
		1 Mortgage interest received from payer(s)/borrower(s)		<b>Copy A</b>  <b>For Internal Revenue Service Center</b>  For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the <b>General Instructions for Certain Information Returns.</b>  <a href="http://www.irs.gov/Form1099">www.irs.gov/Form1099</a>	
		\$			
RECIPIENT'S/LENDER'S TIN	PAYER'S/BORROWER'S TIN	2 Outstanding mortgage principal	3 Mortgage origination date		
		\$			
		4 Refund of overpaid interest	5 Mortgage insurance premiums		
PAYER'S/BORROWER'S name		\$	\$		
		6 Points paid on purchase of principal residence			
		\$			
Street address (including apt. no.)		7 <input type="checkbox"/> If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, check the box, or enter the address or description in box 8.			
City or town, state or province, country, and ZIP or foreign postal code		8 Address or description of property securing mortgage (see instructions)			
9 Number of properties securing the mortgage	10 Other				
Account number (see instructions)					
				11 Mortgage acquisition date	

Form **1098** (Rev. 4-2025)

Cat. No. 14402K

[www.irs.gov/Form1098](http://www.irs.gov/Form1098)

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FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number		1 Payments received for qualified tuition and related expenses	OMB No. 1545-1574  <b>2025</b>  Form <b>1098-T</b>
		2	
FILER'S employer identification no.	STUDENT'S TIN <input type="checkbox"/>	3	
STUDENT'S name		4 Adjustments made for a prior year	5 Scholarships or grants
Street address (including apt. no.)		\$	\$
City or town, state or province, country, and ZIP or foreign postal code		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January–March 2026 <input type="checkbox"/>
Service Provider/Acct. No. (see instr.)	8 Checked if at least half-time student <input type="checkbox"/>	9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund \$

# Tuition Statement

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Form **1098-T**

Cat. No. 25087J

[www.irs.gov/Form1098T](http://www.irs.gov/Form1098T)

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