

EY TaxChat

Additional Information needed to claim American Opportunity Tax Credit (AOTC)

Thank you for providing your education expenses. You may be eligible for the American opportunity tax credit (AOTC) which is a credit for qualified education expenses paid for an eligible student for the first four years of higher education.

For more information about American Opportunity Tax Credit (AOTC) please refer to:

<https://www.irs.gov/credits-deductions/individuals/aotc>

ACTION REQUIRED BY YOU:

Student#1 Name Student#2 Name

YES

NO

YES

NO

- If we did not prepare your return in 2017, did you receive a Form 1098-T from your educational institution with box 2 filled in and box 7 checked for 2017?

- Did you receive Form 1098-T for 2018?

- If "YES", please upload a copy if you haven't already done so.

- Have you claimed the Hope Scholarship Credit or American opportunity credit for any 4 years before 2018?

- If "NO", how many years have you claimed before 2018?

One Two Three

One Two Three

- Were you enrolled at least half time for at least one academic period that began or is treated as having begun in 2018 at an eligible educational institution in a program leading towards a postsecondary degree, certificate, or other recognized postsecondary educational credit?

- Did you complete the first 4 years of postsecondary education before 2018?

- Were you convicted, before the end of 2018, of a felony for possession or distribution of a controlled substance?

- Was any AOTC credit disallowed or reduced in a previous year?

- If "YES", please provide the reason.

Note: If you have more than two students in your household, please fill out another form for the additional student(s).