

# STUDENT TAXPAYER RETURN TEMPLATE

## Academic Year Tax Filing Auxiliary Form

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### 1. STUDENT TAXPAYER INFORMATION

<b>Full Name</b>			
<b>Social Security Number / ITIN</b>		<b>Date of Birth</b>	
<b>Permanent Address</b>			
<b>Filing Status</b>	<input type="checkbox"/> Single <input type="checkbox"/> Married Filing Jointly <input type="checkbox"/> Dependent Child		
<b>Can be claimed as a dependent?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No		

### 2. ACADEMIC INSTITUTION & ENROLLMENT INFORMATION

<b>Name of Educational Institution</b>			
<b>EIN of Institution</b>		<b>Student ID Number</b>	
<b>Enrollment Status</b>	<input type="checkbox"/> At Least Half-Time <input type="checkbox"/> Less Than Half-Time <input type="checkbox"/> Graduate/Professional Student		

### 3. EDUCATION EXPENSES & SCHOLARSHIPS (FORM 1098-T)

<b>Payments Received (Box 1)</b>	\$
<b>Scholarships or Grants (Box 5)</b>	\$
<b>Required Books, Supplies &amp; Equipment (Not in Box 1)</b>	\$

### 4. INCOME DETAILS

<b>Wages, Salaries, Tips (Form W-2, Box 1)</b>	\$
<b>Taxable Scholarship/Fellowship Income</b>	\$
<b>Other Taxable Income (Federal Work-Study, etc.)</b>	\$
<b>Gross Income Total</b>	\$

### 5. ELIGIBLE EDUCATION CREDITS & DEDUCTIONS

<b>American Opportunity Tax Credit (AOTC)</b>	\$
<b>Lifetime Learning Credit (LLC)</b>	\$
<b>Student Loan Interest Deduction</b>	\$

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Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

\_\_\_\_\_  
Student Taxpayer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Preparer Signature (if applicable)

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PTIN/ EIN