

STUDENT TAX RETURN STATEMENT

Academic Year Tax Filing Companion

1. STUDENT TAXPAYER INFORMATION

FULL NAME OF STUDENT

SOCIAL SECURITY NUMBER / TAX ID

EDUCATIONAL INSTITUTION

STUDENT IDENTIFICATION NUMBER

CURRENT MAILING ADDRESS

ENROLLMENT STATUS

Full-Time

Part-Time

Less than Half-Time

FILING STATUS

Single

Dependent Child

2. ACADEMIC & EARNED INCOME

INCOME SOURCE	AMOUNT (\$)
Wages, Salaries, and Tips (Form W-2 / Paystubs)	
Taxable Scholarships, Fellowships, or Grants	
Teaching or Research Assistantship Stipends	
Other Taxable Income	
Total Gross Student Income (Add lines above)	

3. QUALIFIED EDUCATION EXPENSES & DEDUCTIONS

EXPENSE DESCRIPTION	AMOUNT (\$)
Qualified Tuition and Required Fees (Form 1098-T)	
Required Books, Supplies, and Course Materials	
Student Loan Interest Paid	
Other Allowable Deductions	
Total Education Deductions (Add lines above)	

4. EDUCATION TAX CREDITS

ELIGIBLE CREDITS

- American Opportunity Credit
- Lifetime Learning Credit

5. TAXABLE INCOME CALCULATION

A. Total Gross Income (From Section 2)	
B. Less: Total Education Deductions (From Section 3)	
Net Taxable Income (Subtract Line B from Line A)	

6. DECLARATION AND SIGNATURES

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.

SIGNATURE OF STUDENT TAXPAYER

DATE