

# TAX RETURN WORKSHEET

Student Taxpayers • Tax Year: 20\_\_\_\_\_

## 1. STUDENT INFORMATION

FULL NAME

SOCIAL SECURITY NUMBER / ITIN

DATE OF BIRTH

COLLEGE/UNIVERSITY NAME

FILING STATUS

Single

ENROLLMENT LEVEL

Dependent Child

Undergraduate

Other

Graduate

INCOME INFORMATION

Income Type	Source / Employer	Amount (\$)
W-2 Wages (Box 1)		
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Taxable Scholarships/Fellowships (not on W-2)		
Interest / Dividend Income (1099-INT / 1099-DIV)		
Other Income (e.g., Gig Work, 1099-NEC)		
<b>Total Gross Income:</b>		

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

Form 1098-T Box Reference	Description	Amount (\$)
Box 1	Payments received for qualified tuition and related expenses	
Box 5	Scholarships or grants administered by the institution	
Out-of-pocket	Required course materials (Books, supplies, equipment not in Box 1)	

## 4. TAX WITHHELD & PAYMENTS

Type of Tax Paid	Amount (\$)
Federal Income Tax Withheld (Form W-2, Box 2)	
State Income Tax Withheld (Form W-2, Box 17)	
Estimated Tax Payments Made (if any)	

TAXPAYER SIGNATURE

DATE