

**EDUCATION EXPENSE**  
**Post Secondary (College)**

**TAX YEAR 2023** **A & G Tax Service, LLC**  
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Student Name			
1st Year in Post Secondary School			
<b>POST SECONDARY 1st 4 years (American Opportunity Credit)...up to \$2,500 credit</b>			
Pursing a degree in what major			
Enrolled at lease half-time student			
Student convicted before year-end 2022 ***			
Tuition	\$	\$	\$
Books/Supplies	\$	\$	\$
Fees - Enrollment	\$	\$	\$
Computer and/or Software	\$	\$	\$
Room/Board *	\$	\$	\$
Transportation Ins (NOT deductible)	\$	\$	\$
Scholarships or Grants RECEIVED	\$	\$	\$
Qualified Tuition & Related Expenses	\$	\$	\$
<b>POST SECONDARY - AFTER 1st 4 years (Lifetime Learning Credit) ...Max \$2,000 (20% of exp up to \$9,000)</b>			
Tuition	\$	\$	\$
Books/Supplies **	\$	\$	\$
Fees - Enrollment	\$	\$	\$
Room/Board *	\$	\$	\$

Post Secondary NOTES:

- \* Room/Board costs are NOT deductible for the education credit, so keep costs separate.
- \* Room/Board costs ARE qualified expenses if taking a distrubution from a 529 Plan.
- \*\* Books/Supplies AFTER 1st 4 years must be purchased from educational institution.
- \*\*\* Convicted of a felony for possession or distribution of a controlled substance.