

Higher Education

Taxpayer:
Spouse:

Tax Year 2024

Degree/Program Study at Eligible Educational Institution during 2024

TAXPAYER ☐ Undergraduate ☐ Graduate MBA ☐ Graduate Other ☐ Other*

SPOUSE ☐ Undergraduate ☐ Graduate MBA ☐ Graduate Other ☐ Other*

* Other, Specify:

Name of college or university attended:

Tuition & Fees Paid in 2024

	TAXPAYER	SPOUSE
Total amount of tuition & fees	\$	\$
Required books & supplies	\$	\$

The expenses above may qualify for you for the American opportunity credit, lifetime learning credit, or tuition deduction.

Scholarship and Fellowship Income Received in 2017

- \$ **1** Total amount of scholarship/fellowship grants received
- \$ **2** Amt of line 1 received for performing services (e.g., teaching, research, or any other service).
This should be reported on a Form W2 or Form 1042-S (income codes 16-19). It is taxable as wages.
- \$ **3** (Amt of scholarship received for which no services were performed.)
- \$ **4** Enter the amount from line 3 that your scholarship or fellowship **required** you to use for anything other than tuition, fees, books & supplies (e.g., room & board, travel, etc.)
- \$ **5**
- \$ **6** Enter the amount from line 5 that was used for tuition, fees & required books, supplies.
(This is the tax-free part of your scholarship)
- \$ **7**
- \$ **8** (This is the taxable part of your scholarship)

Did you participate in an employer provided educational assistance program? ☐ Yes ☐ No

Work Related Education Deduction

If you qualify, you may be able to deduct your graduate tuition and course expenses in full.

Warning: Because the deduction is often large and the rules are subject to interpretation, the IRS has increased audits in this area. [Click here to read more information before answering the following questions.](#)

I Did your graduate education improve your skills in a profession you had already established? ☐ Yes ☐ No

If so, do you want to claim the work related education deduction? ☐ Yes ☐ No

Claiming your dependent's education expenses

You must have paid for your dependent's tuition expense in order to claim it on your tax return.

You cannot claim tuition for your dependent if he or she paid for the tuition (e.g., with student loans in his or her name).

Dependent must be:

- 1 Claimed as a dependent on your tax return
- 2 Between the ages of 18 and 23 during 2024
- 3 A full-time student

The expenses above may qualify for you for the American opportunity credit, lifetime learning credit, or tuition deduction.

Dependent 1

Name of dependent

College Attended:

☐ Undergraduate ☐ Graduate ☐ Other (specify other)

Total amount you paid for your dependent in 2024

Tuition & fees

\$

Required books & supplies

\$

Dependent 2

Name of dependent

College Attended:

☐ Undergraduate ☐ Graduate ☐ Other (specify other)

Total amount you paid for your dependent in 2024

Tuition & fees

\$

Required books & supplies

\$