



## **EDUCATION CREDITS AND DEDUCTIONS**

The IRS updated the requirements for claiming Education Credits. It now requires us to obtain additional information for each student claiming an Education Credit.

In order for us to prepare a complete and accurate return for those clients who claim Education Credits or deductions, we will need the following information when you come to your tax interview appointment:

- **Year 2024 Form 1098-T Tuition Statement from the educational institution.**
- **The students full “Billing Account Activity Statement” showing all activity from the beginning of when the student started attending the educational institution.**
- **Amount paid for Course Materials (if applicable) in 2024. Including *required* books, supplies, equipment - not computers.**

\*If you used any distributions from a 529 Plan, we will need tuition, books, fees, supplies, required equipment, and in addition to the above, room and board (or allowance for room and board), computer, and software.

**If you have any questions, please call.  
(608) 362-1224**