



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 2022 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 2022. Including *required* books, supplies, equipment - not computers.**