



## **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 2023 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 2023. Including *required* books, supplies, equipment - not computers.**