

2009

1040

US

Education Credits / Tuition Deduction

38

Please complete the information below if you paid qualified education expenses in 2009 for you, your spouse, or your dependents enrolled in an accredited postsecondary institution. Last year's amounts are provided for your reference.

**PERSONS AND EXPENSES QUALIFYING FOR EDUCATION CREDITS OR TUITION DED.**

|                          |  | 2009 Amount  | 2008 Amount |
|--------------------------|--|--|-------------|
| No. <input type="text"/> | Student Info.<br>1=taxpayer, 2=spouse.....<br>First name.....<br>Last name.....<br>Social security number..... |  |             |
|                          |  | 1=American opportunity/hope credit, 2=lifetime learning credit...                  |             |
|                          |  | Number of years hope credit claimed.....   |             |
|                          |  | Student completed 1st 4 years of post-secondary edu. before 2009: 1=yes, 2=no. . . |             |
|                          | 1=student attended educational institution in midwest disaster area . . . . .                                  |  |             |
|                          | Qualified tuition and fees paid in 2009 (net of refund or assistance and not entered elsewhere) . . . . .      |  |             |
|                          | Course related materials required to be purchased from institution . . . . .                                   |  |             |
|                          | Course related materials not entered above . . . . .   |  |             |
|                          | Reasonable cost of room and board (midwestern disaster only). . . . .  |  |             |
|                          | Expenses of a special needs student (midwestern disaster only). . . . .  |  |             |
|                          | Amount of prior year refund or assistance* . . . . .   |  |             |

|                          |  |  |  |
|--------------------------|--|--|--|
| No. <input type="text"/> | Student Info.<br>1=taxpayer, 2=spouse.....<br>First name.....<br>Last name.....<br>Social security number..... |  |  |
|                          |  | 1=American opportunity/hope credit, 2=lifetime learning credit...                  |  |
|                          |  | Number of years hope credit claimed.....   |  |
|                          |  | Student completed 1st 4 years of post-secondary edu. before 2009: 1=yes, 2=no. . . |  |
|                          | 1=student attended educational institution in midwest disaster area . . . . .                                  |  |  |
|                          | Qualified tuition and fees paid in 2009 (net of refund or assistance and not entered elsewhere) . . . . .      |  |  |
|                          | Course related materials required to be purchased from institution . . . . .                                   |  |  |
|                          | Course related materials not entered above . . . . .   |  |  |
|                          | Reasonable cost of room and board (midwestern disaster only). . . . .  |  |  |
|                          | Expenses of a special needs student (midwestern disaster only). . . . .  |  |  |
|                          | Amount of prior year refund or assistance* . . . . .   |  |  |

|                          |  |  |  |
|--------------------------|--|--|--|
| No. <input type="text"/> | Student Info.<br>1=taxpayer, 2=spouse.....<br>First name.....<br>Last name.....<br>Social security number..... |  |  |
|                          |  | 1=American opportunity/hope credit, 2=lifetime learning credit...                  |  |
|                          |  | Number of years hope credit claimed.....   |  |
|                          |  | Student completed 1st 4 years of post-secondary edu. before 2009: 1=yes, 2=no. . . |  |
|                          | 1=student attended educational institution in midwest disaster area . . . . .                                  |  |  |
|                          | Qualified tuition and fees paid in 2009 (net of refund or assistance and not entered elsewhere) . . . . .      |  |  |
|                          | Course related materials required to be purchased from institution . . . . .                                   |  |  |
|                          | Course related materials not entered above . . . . .   |  |  |
|                          | Reasonable cost of room and board (midwestern disaster only). . . . .  |  |  |
|                          | Expenses of a special needs student (midwestern disaster only). . . . .  |  |  |
|                          | Amount of prior year refund or assistance* . . . . .   |  |  |

\*Refund of qualified expenses and tax-free educational assistance received after you file your return for the year in which the expenses were paid.