

2009

1040

US

Education Distributions (ESA's and QTP's)

14.3

Please enter all pertinent 2009 amounts and attach all 1099-Q forms.  
 Enter qualified education expenses below that are not entered elsewhere.  
 Last year's amounts are provided for your reference.

**ESA'S AND QTP'S (Form 1099-Q)**

2009 Amount

2008 Amount

No. <input type="text"/>	Name of payer .....		
	1=spouse .....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits) .....		
	Elementary & secondary education (net of nontaxable benefits) ..		
	Form 1099-Q:		
	Gross distributions (Box 1) .....		
	Earnings (Box 2) .....		
	Basis (Box 3) .....		
	Rollover: 1=nontaxable, 2=taxable (Box 4) .....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) ...		
	ESA's only:		
2009 contributions to this ESA .....			
Value of this account at 12/31/09 (plus outstanding rollovers) .....			
Basis in this ESA as of 12/31/08 .....			

No. <input type="text"/>	Name of payer .....		
	1=spouse .....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits) .....		
	Elementary & secondary education (net of nontaxable benefits) ..		
	Form 1099-Q:		
	Gross distributions (Box 1) .....		
	Earnings (Box 2) .....		
	Basis (Box 3) .....		
	Rollover: 1=nontaxable, 2=taxable (Box 4) .....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) ...		
	ESA's only:		
2009 contributions to this ESA .....			
Value of this account at 12/31/09 (plus outstanding rollovers) .....			
Basis in this ESA as of 12/31/08 .....			

No. <input type="text"/>	Name of payer .....		
	1=spouse .....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits) .....		
	Elementary & secondary education (net of nontaxable benefits) ..		
	Form 1099-Q:		
	Gross distributions (Box 1) .....		
	Earnings (Box 2) .....		
	Basis (Box 3) .....		
	Rollover: 1=nontaxable, 2=taxable (Box 4) .....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) ...		
	ESA's only:		
2009 contributions to this ESA .....			
Value of this account at 12/31/09 (plus outstanding rollovers) .....			
Basis in this ESA as of 12/31/08 .....			

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