

EDUCATION INCENTIVES

Several recent tax laws have created potential post-secondary education expense deductions and credits to be claimed on your income tax returns. Please fill out the following information for each family member and **attach all applicable forms received from school(s) attended and copies of all tuition invoices.**

	Name of Student			
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>
Standing per school records at January 1, 2021 (Freshman, Sophomore, Junior, Senior)				
School Attended				
If NOT a Wisconsin school, did you pay the same tuition rate as an in-state student?				
Enrollment status Full time/Part time				
2022 expenses paid in 2021? Yes/No-If Yes provide details				
Tuition, fees, books & supplies paid (not including room & board) January 1, 2021 to December 31, 2021 Provide Form 1098-T				
Contributions to a '529 Plan' (qualified college savings plan) in 2021.				
Distributions from '529' Plan?				
Will/did your college age dependent claim themselves on their own tax return?				
Did you withdraw money from retirement plans to pay for tuition? Provide details.				
<u>STUDENT LOAN INTEREST</u>				
2021 student loan interest paid				
Primary debtor - child/parent?				
Parents co-signed? Yes/No				