

Supporting Documents to Prove American Opportunity Credit

We need to verify if you are eligible to claim the American Opportunity Credit shown on your tax return. Please provide photocopies of cancelled checks, receipts for tuition, fees and books as well as the transcripts from the educational institution. If you received payments for educational expenses, you will need to provide any or all of the following documents that apply:

- Employer provided educational assistance benefits
- Withdrawals from any educational retirement arrangements
- U.S. Savings bond interest that is nontaxable because you paid qualified higher education expenses
- Veteran’s educational assistance benefits or
- Any other nontaxable payment received for education expenses
- Form 1098-T, **if** an amount is entered in Box 1 showing payments received for qualified tuition and related expenses. (**Note:** Educational institutions are not required to provide this information.)

Note: The following expenses are not allowable and do not qualify for the American Opportunities Credit:

- Insurance
- Medical expenses (including student health fees)
- Room and Board
- Similar personal, living or family expenses. This is true even if the amount must be paid to the institution as a condition of enrollment or attendance.