

TAXPAYER FORM
FEDERAL ASSISTANCE WITH ACADEMIC COSTS

The University of Kentucky is required to provide the Internal Revenue Service with data by which the IRS can substantiate claims for these tax credits. To meet our obligations to the IRS we need information on both the student and the taxpayer *who will claim the tax credit*. Please provide the information requested below.

The Taxpayer Relief Act of 1997 has extended new federal tax credits to individuals and families in meeting the costs of higher education. These include the **Hope and Lifetime Learning Tax Credits**.

Requirements and exclusions for each are detailed and specific. Individuals desiring to avail themselves of these tax credits should consult IRS Publication 970. This office cannot provide information pertaining to your tax preparations. Please refer to Publication 970 from the Department of Treasury, Internal Revenue Service for information about the tax benefits for higher education. This publication is on-line at: <http://ftp.fedworld.gov/pub/irs-pdf/p970.pdf>

Higher education expenses paid with a tax-free scholarship, Pell Grant, or employer-provided educational assistance are not eligible for these tax credits.

THIS FORM MUST BE COMPLETED AND SUBMITTED AT THE TIME OF ENROLLMENT

Student's Last Name _____ First Name _____ M.I. _____

Student Social Security Number _____

Student's Address _____

City _____ State _____ Zip Code _____

IF THE STUDENT IS NOT A TAX FILER,
the following portion must be completed at the time of registration.

Taxpayer's (Filer's) Last Name _____ First Name _____ M.I. _____

Taxpayer's (Filer's) SSN _____

Taxpayer's Address _____

City _____ State _____ Zip Code _____

Signature of person providing this information: _____

FOR OFFICE USE:

Date Enrolled	Enrollment Number	Course Number	Fee	Hours

Half-Time Student: _____ Credit Hours: _____ Eligible: _____ Not Eligible: _____