

Name:	2009
SS#:	
Page of	

STATEMENT EH

Education Expense & Head of Household

STATEMENT OF EDUCATION EXPENSE		
You Must Answer Questions 1 thru 4 to Qualify Your Deduction	Yes	No
1. Is education required to meet the basic requirement of your profession?		
2. Will education qualify you for a new business or profession?		
Note: If you answered "Yes" to question 1 or 2, STOP. You may not deduct your expenses.		
3. Are you required to complete this education as a condition of your employment?		
4. Does education maintain or improve skills required in your employment?		
Note: If you answered "No" to questions 3 and 4, STOP. You may not deduct your expenses.		
EDUCATIONAL EXPENSES		EDUCATIONAL INSTITUTION
5. Tuition and fees		Name:
6. Books and supplies		
7. Printing & Copying		Address:
8. Transcript Fees		
9. Mileage (number of miles _____)		Course of Study:
10. Airfare, Trainfare, Etc.		
11. Lodging away from home overnight (NOT including Meals)		Dates Attended:
12. Meals while away from home overnight (Total _____ x 50%)		
		EMPLOYER DURING SCHOOLING
13. Local Transportation		Name:
14. Parking fees and tolls		
15. Total Expenses (add lines 5 thru 13)		
16. Reimbursements not included in form W2 / 1099		Address:
17. Reimbursements included in form W2 / 1099, no withholding		
18. Total Reimbursements (add lines 15 and 16)		Note:
19. Deductible Education Expenses (line 14 less line 17)		

SCHEDULE FOR QUALIFICATION AS HEAD OF HOUSEHOLD	
1. DESCRIBE TAXPAYER (CHECK WHICH APPLIES):	
<input type="checkbox"/> A. An unmarried person <input type="checkbox"/> B. Divorced or legally separated. (Persons under an interlocutory Decree do not qualify) <input type="checkbox"/> C. Married to a nonresident alien at close of year <input type="checkbox"/> D. A married person filing separately whose spouse was not a member of the household for the last 6 months of the taxable year. (Must check "D" below to qualify)	
2. TAXPAYER PAID OVER HALF THE COST OF A HOUSEHOLD THAT WAS THE PRINCIPAL RESIDENCE FOR OVER 6 MONTHS OF THE TAXPAYER AND:	
<input type="checkbox"/> A. AT LEAST ONE PARENT. Parent need not live with taxpayer, but MUST qualify as a dependent. (If the parent did not live with taxpayer, home must have been the parent's principal residence for the whole year). Name of Parent: _____	
<input type="checkbox"/> B. AT LEAST ONE UNMARRIED CHILD, GRANDCHILD, OR STEPCHILD OF THE TAXPAYER. The child MUST live with the taxpayer. Name of unmarried child: _____ A Dependent <input type="checkbox"/>	
<input type="checkbox"/> C. AT LEAST ONE RELATIVE (which could include a married child). Relative MUST live with the taxpayer AND qualify as a dependent. Name of person: _____ Relationship: _____	
<input type="checkbox"/> D. AT LEAST ONE CHILD OR STEPCHILD. The child MUST live with the taxpayer and MUST qualify as a dependent unless the exemption was waived or a pre-'85 agreement. (Applies only to "D" above). Name of child: _____	