



ATI FINANCIAL SERVICES, LLC
SUMMARY OF EDUCATION COSTS: 2019

CLIENT: _____

	STUDENT	STUDENT	STUDENT	STUDENT										
	NAME	NAME	NAME	NAME										
PRESCRIPTIONS														
TUITION PAID														
FEES														
BOOKS														
ROOM AND BOARD *														
COMPUTER COSTS														
OTHER - DESCRIBE														
TOTAL	\$ -	\$ -	\$ -	\$ -										

INCLUDE EXPENSES PAID OUT OF POCKET, VIA LOANS, SCHOLARSHIPS, OR FROM 529 PLAN DISCRIBUTIONS

PLEASE PROVIDE COPIES OF ANY FORMS 1098-T AND 1099-Q

* - IF STUDENT LIVED OFF-CAMPUS USE SCHOOL'S EQUIVALENT COST AS PER THEIR WEBSITE

TOTALS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0

(1): NON-MONETARY CONTRIBUTIONS IN EXCESS OF \$500 WILL REQUIRE PREPARATION OF FORM 8283.

(2): NON-MONETARY CONTRIBUTIONS IN EXCESS OF \$5,000 WILL REQUIRE PREPARATION OF FORM 8284 AND INCLUSION OF AN INDEPENDENT CERTIFIED APPRAISAL WITH THE INCOME TAX RETURN.