



ATI FINANCIAL SERVICES, LLC
 SUMMARY OF EDUCATION COSTS: 2020

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.