



ATI FINANCIAL SERVICES, LLC
SUMMARY OF EDUCATION COSTS: 2023

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.