

2022 FORM 8863 INSTRUCTIONS

DECODING THE 2022 FORM 8863 INSTRUCTIONS: A COMPREHENSIVE GUIDE

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KEYWORD: 2022 FORM 8863 INSTRUCTIONS

INTRODUCTION:

NAVIGATING THE COMPLEXITIES OF THE US TAX CODE CAN BE DAUNTING, ESPECIALLY WHEN DEALING WITH FORMS LIKE FORM 8863, EDUCATION CREDITS (AMERICAN OPPORTUNITY AND LIFETIME LEARNING CREDITS). THIS COMPREHENSIVE GUIDE DELVES INTO THE INTRICACIES OF THE 2022 FORM 8863 INSTRUCTIONS, PROVIDING CLEAR EXPLANATIONS, PRACTICAL EXAMPLES, AND METHODOLOGIES TO HELP YOU ACCURATELY COMPLETE THIS CRUCIAL FORM. UNDERSTANDING THE 2022 FORM 8863 INSTRUCTIONS IS ESSENTIAL FOR MAXIMIZING YOUR EDUCATION TAX BENEFITS.

UNDERSTANDING THE PURPOSE OF FORM 8863:

FORM 8863, EDUCATION CREDITS (AMERICAN OPPORTUNITY AND LIFETIME LEARNING CREDITS), IS USED TO CLAIM EITHER THE AMERICAN OPPORTUNITY TAX CREDIT (AOTC) OR THE LIFETIME LEARNING CREDIT (LLC). THESE CREDITS CAN SIGNIFICANTLY REDUCE YOUR TAX LIABILITY IF YOU, YOUR SPOUSE, OR YOUR DEPENDENT ARE PURSUING HIGHER EDUCATION. THE 2022 FORM 8863 INSTRUCTIONS PROVIDE DETAILED GUIDANCE ON ELIGIBILITY REQUIREMENTS, CALCULATION METHODS, AND DOCUMENTATION NEEDED. FAILING TO FOLLOW THE 2022 FORM 8863 INSTRUCTIONS CORRECTLY CAN LEAD TO DELAYS IN PROCESSING YOUR RETURN OR EVEN REJECTION OF YOUR CLAIM.

KEY ASPECTS COVERED IN THE 2022 FORM 8863 INSTRUCTIONS:

THE 2022 FORM 8863 INSTRUCTIONS COMPREHENSIVELY COVER SEVERAL KEY ASPECTS:

1. ELIGIBILITY REQUIREMENTS:

STUDENT ELIGIBILITY: THE INSTRUCTIONS CLEARLY OUTLINE THE REQUIREMENTS FOR THE STUDENT, INCLUDING ENROLLMENT STATUS (AT LEAST HALF-TIME), DEGREE-SEEKING STATUS, AND RESIDENCY. UNDERSTANDING THESE CRITERIA IS CRITICAL TO DETERMINING ELIGIBILITY FOR EITHER THE AOTC OR LLC. THE 2022 FORM 8863 INSTRUCTIONS PROVIDE SPECIFIC DETAILS ON THESE REQUIREMENTS.

COURSE REQUIREMENTS: THE TYPE OF COURSES TAKEN ALSO PLAYS A CRUCIAL ROLE. THE 2022 FORM 8863 INSTRUCTIONS SPECIFY WHAT QUALIFIES AS ELIGIBLE EDUCATIONAL EXPENSES.

DEPENDENT STATUS: IF CLAIMING THE CREDIT FOR A DEPENDENT, THE 2022 FORM 8863 INSTRUCTIONS CLARIFY THE REQUIREMENTS FOR CLAIMING A DEPENDENT ON YOUR TAX RETURN, INCLUDING THE DEPENDENCY TESTS.

2. CREDIT CALCULATION:

AMERICAN OPPORTUNITY TAX CREDIT (AOTC): THE 2022 FORM 8863 INSTRUCTIONS DETAIL THE CALCULATION OF THE AOTC, WHICH IS A MAXIMUM OF \$2,500 PER ELIGIBLE STUDENT. THE INSTRUCTIONS GUIDE YOU THROUGH DETERMINING YOUR QUALIFIED EDUCATION EXPENSES AND CALCULATING THE CREDIT BASED ON YOUR MODIFIED ADJUSTED GROSS INCOME (MAGI).

LIFETIME LEARNING CREDIT (LLC): FOR THOSE NOT ELIGIBLE FOR THE AOTC, THE LLC OFFERS A MAXIMUM CREDIT OF \$2,000 PER TAX RETURN, REGARDLESS OF THE NUMBER OF STUDENTS. THE 2022 FORM 8863 INSTRUCTIONS CLEARLY EXPLAIN THE CALCULATION PROCESS FOR THE LLC.

3. DOCUMENTATION REQUIREMENTS:

THE 2022 FORM 8863 INSTRUCTIONS EMPHASIZE THE IMPORTANCE OF RETAINING PROPER DOCUMENTATION. THIS INCLUDES FORM 1098-T, TUITION STATEMENT, WHICH PROVIDES DETAILS OF THE PAYMENTS MADE FOR QUALIFIED EDUCATION EXPENSES. KEEPING ACCURATE RECORDS IS CRUCIAL IN CASE OF AN IRS AUDIT. THE 2022 FORM 8863 INSTRUCTIONS ADVISE ON THE NECESSARY DOCUMENTATION TO SUPPORT YOUR CLAIM.

4. COMMON MISTAKES TO AVOID:

MANY TAXPAYERS MAKE MISTAKES WHEN COMPLETING FORM 8863. THE 2022 FORM 8863 INSTRUCTIONS HIGHLIGHT COMMON ERRORS, SUCH AS:

- INCORRECTLY REPORTING QUALIFIED EDUCATION EXPENSES.
- MISUNDERSTANDING THE ELIGIBILITY REQUIREMENTS FOR THE STUDENT.
- FAILING TO MAINTAIN ADEQUATE DOCUMENTATION.
- CLAIMING BOTH THE AOTC AND LLC FOR THE SAME STUDENT.

BY CAREFULLY REVIEWING THE 2022 FORM 8863 INSTRUCTIONS, YOU CAN AVOID THESE PITFALLS.

5. INTERACTION WITH OTHER TAX CREDITS AND DEDUCTIONS:

THE 2022 FORM 8863 INSTRUCTIONS ALSO ADDRESS HOW THE EDUCATION CREDITS INTERACT WITH OTHER TAX BENEFITS, SUCH AS THE DEDUCTION FOR QUALIFIED TUITION AND FEES. UNDERSTANDING THESE INTERACTIONS IS CRUCIAL FOR MAXIMIZING YOUR TAX SAVINGS.

METHODOLOGIES FOR COMPLETING FORM 8863:

SEVERAL METHODOLOGIES CAN BE EMPLOYED TO ENSURE ACCURATE COMPLETION OF FORM 8863:

CAREFUL REVIEW OF INSTRUCTIONS: BEGIN BY THOROUGHLY READING THE 2022 FORM 8863 INSTRUCTIONS TO UNDERSTAND THE REQUIREMENTS AND CALCULATION METHODS.

GATHER NECESSARY DOCUMENTATION: COLLECT ALL RELEVANT DOCUMENTATION, INCLUDING FORM 1098-T AND ANY OTHER RECORDS SUPPORTING YOUR EXPENSES.

STEP-BY-STEP COMPLETION: WORK THROUGH THE FORM SYSTEMATICALLY, COMPLETING EACH SECTION ACCURATELY AND CAREFULLY.

SEEK PROFESSIONAL ASSISTANCE: IF YOU'RE UNSURE ABOUT ANY ASPECT OF THE FORM, CONSIDER CONSULTING A TAX PROFESSIONAL.

CONCLUSION:

SUCCESSFULLY NAVIGATING THE 2022 FORM 8863 INSTRUCTIONS IS ESSENTIAL FOR CLAIMING EDUCATION CREDITS ACCURATELY. BY UNDERSTANDING THE ELIGIBILITY REQUIREMENTS, CALCULATION METHODS, AND DOCUMENTATION NEEDS, TAXPAYERS CAN MAXIMIZE THEIR TAX SAVINGS. CAREFUL REVIEW OF THE INSTRUCTIONS AND, WHEN NECESSARY, SEEKING PROFESSIONAL ADVICE, WILL ENSURE COMPLIANCE AND AVOID POTENTIAL ERRORS.

FAQs:

1. WHAT IS THE DIFFERENCE BETWEEN THE AMERICAN OPPORTUNITY CREDIT AND THE LIFETIME LEARNING CREDIT? THE AOTC IS FOR UNDERGRADUATE STUDENTS, WHILE THE LLC CAN BE USED FOR UNDERGRADUATE OR GRADUATE STUDENTS. THE AOTC HAS A MAXIMUM CREDIT AMOUNT OF \$2,500 AND MAY BE PARTIALLY REFUNDABLE, WHEREAS THE LLC HAS A MAXIMUM CREDIT OF \$2,000 AND IS NON-REFUNDABLE.
1. CAN I CLAIM BOTH THE AOTC AND LLC FOR THE SAME STUDENT? No, YOU CANNOT CLAIM BOTH CREDITS FOR THE SAME STUDENT IN THE SAME YEAR.
1. WHAT IF MY FORM 1098-T IS INCORRECT? CONTACT THE INSTITUTION THAT ISSUED THE FORM IMMEDIATELY TO HAVE IT CORRECTED.
1. WHAT HAPPENS IF I MAKE A MISTAKE ON FORM 8863? THE IRS MAY CONTACT YOU FOR CLARIFICATION OR ADJUST YOUR CREDIT. IN SOME CASES, IT MAY LEAD TO PENALTIES OR INTEREST.
1. WHERE CAN I FIND THE 2022 FORM 8863 AND ITS INSTRUCTIONS? YOU CAN DOWNLOAD THEM FROM THE IRS WEBSITE (IRS.GOV).
1. WHAT IF I DIDN'T RECEIVE A FORM 1098-T? CONTACT YOUR EDUCATIONAL INSTITUTION TO REQUEST A COPY.
1. CAN I CLAIM THE CREDIT IF I'M A NON-RESIDENT ALIEN? GENERALLY, NO, UNLESS SPECIFIC REQUIREMENTS ARE MET. CONSULT THE 2022 FORM 8863 INSTRUCTIONS FOR DETAILS.
1. WHAT QUALIFIES AS "QUALIFIED EDUCATION EXPENSES"? TUITION AND FEES, AS WELL AS CERTAIN OTHER EXPENSES, MAY QUALIFY. REFER TO THE 2022 FORM 8863 INSTRUCTIONS FOR A COMPLETE LIST.
1. IS THERE A LIMIT TO THE NUMBER OF YEARS I CAN CLAIM THE AOTC? YES, THE AOTC CAN BE CLAIMED FOR A MAXIMUM OF FOUR TAX YEARS PER ELIGIBLE STUDENT.

RELATED ARTICLES:

1. UNDERSTANDING FORM 1098-T: A GUIDE FOR STUDENTS AND PARENTS: THIS ARTICLE EXPLAINS HOW TO INTERPRET FORM 1098-T AND ITS RELEVANCE TO CLAIMING EDUCATION CREDITS.
1. MAXIMIZING YOUR EDUCATION TAX BENEFITS: STRATEGIES FOR CLAIMING CREDITS: THIS ARTICLE EXPLORES VARIOUS STRATEGIES FOR MAXIMIZING EDUCATION TAX BENEFITS.
1. EDUCATION CREDITS VS. EDUCATION DEDUCTIONS: WHICH IS RIGHT FOR YOU?: THIS ARTICLE COMPARES EDUCATION CREDITS AND DEDUCTIONS, HELPING YOU DETERMINE WHICH IS MORE BENEFICIAL IN YOUR SITUATION.
1. COMMON MISTAKES TO AVOID WHEN FILING FORM 8863: THIS ARTICLE HIGHLIGHTS COMMON ERRORS MADE WHEN COMPLETING FORM 8863 AND PROVIDES TIPS FOR AVOIDING THEM.
1. HOW TO CORRECT ERRORS ON FORM 8863: THIS ARTICLE EXPLAINS HOW TO CORRECT ERRORS ON FORM 8863 AND OUTLINES THE PROCESS FOR AMENDING YOUR TAX RETURN.
1. IRS AUDIT OF EDUCATION CREDITS: WHAT TO EXPECT: THIS ARTICLE EXPLAINS WHAT TO EXPECT IF YOUR EDUCATION CREDIT CLAIM IS AUDITED BY THE IRS.
1. EDUCATION CREDITS FOR GRADUATE STUDENTS: THIS ARTICLE FOCUSES SPECIFICALLY ON THE EDUCATION CREDIT OPTIONS AVAILABLE TO GRADUATE STUDENTS.
1. CLAIMING EDUCATION CREDITS FOR DISABLED STUDENTS: THIS ARTICLE ADDRESSES THE SPECIFIC CIRCUMSTANCES OF CLAIMING EDUCATION CREDITS FOR STUDENTS WITH DISABILITIES.
1. THE IMPACT OF THE AMERICAN RESCUE PLAN ON EDUCATION CREDITS: THIS ARTICLE ANALYZES THE CHANGES TO EDUCATION CREDITS BROUGHT ABOUT BY THE AMERICAN RESCUE PLAN.

ADDITIONAL RESOURCES

THE BIGGEST NEWS EVENTS OF 2022 - IN PICTURES / WORLD ECO...

DEC 16, 2022 · THE VOTE FOR ABORTION RIGHTS WAS 5-4 TO OVERTURN THE LANDMARK 1973 ROE VS WADE RULING, ON 24 JUNE, 2022. IMAGE: REUTERS/MICHAEL A. ...

THE FUTURE OF JOBS REPORT 2025 - WORLD ECONOMIC FORUM

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GO TO WWW.IRS.GOV/FORM8863 FOR INSTRUCTIONS AND THE LATEST ...

FORM 8863 (2023) PAGE 2 NAME(S) SHOWN ON RETURN YOUR SOCIAL SECURITY NUMBER CAUTION COMPLETE PART III FOR EACH STUDENT FOR WHOM YOU'RE CLAIMING EITHER THE AMERICAN OPPORTUNITY

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KENTUCKY EDUCATION TUITION TAX CREDIT ENTER NAME(S) AS SHOWN ON FORM 740 OR FORM 740-NP, PAGE 1. YOUR SOCIAL SECURITY NUMBER ENCLOSE WITH FORM 740 OR FORM 740-NP ...

2023 FORM 8863 - INTERNAL REVENUE SERVICE

FORM 8863 DEPARTMENT OF THE TREASURY INTERNAL REVENUE SERVICE ... FOR PAPERWORK REDUCTION ACT NOTICE, SEE YOUR TAX RETURN INSTRUCTIONS. CAT. No. 25379M FORM . 8863 (2023) FORM 8863 ...

PUBLICATION 4491 (REV. 10-2021) - IRS TAX FORMS

STUDENT MUST FILE FORM 8615, TAX FOR CERTAIN CHILDREN WHO HAVE UNEARNED INCOME (KIDDIE TAX) TO COMPUTE THE TAX. IN THIS CASE, FORM 8615 IS OUT OF SCOPE FOR THE VITA/TCE PROGRAMS. SEE THE ...

PREPARE, PRINT, AND E-FILE YOUR FEDERAL TAX RETURN FOR FREE!

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8867 PAID PREPARER'S DUE DILIGENCE CHECKLIST - INTERNAL ...

1. INSTRUCTIONS, AND/OR THE AOTC WORKSHEET FOUND IN THE FORM 8863 INSTRUCTIONS, OR YOUR OWN WORKSHEET(S) THAT PROVIDES THE SAME INFORMATION, AND ALL RELATED FORMS AND SCHEDULES FOR EACH ...

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EDUCATIONAL INSTITUTION INFORMATION (SEE INSTRUCTIONS) A. NAME OF FIRST EDUCATIONAL INSTITUTION (1) ADDRESS. NUMBER AND STREET (OR P.O. BOX). CITY, TOWN OR POST OFFICE, STATE, AND ZIP CODE. IF A ...

ENTERING EDUCATION BENEFITS - IRS TAX FORMS

TAXSLAYER NAVIGATION: FEDERAL SECTION>DEDUCTIONS>CREDITS MENU>EDUCATION CREDITS FORM 1098-T; OR KEYWORD "8863" OR "1098-T" • ONLY THE TAXPAYER IS ELIGIBLE TO CLAIM THE CREDIT IF HE OR SHE ...

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2022 FORM 1040-SR - INTERNAL REVENUE SERVICE

FORM 1040-SR U.S. TAX RETURN FOR SENIORS 2022 DEPARTMENT OF THE TREASURY—INTERNAL REVENUE SERVICE . OMB No. 1545-0074. IRS USE ONLY—DO NOT WRITE OR STAPLE IN THIS SPACE. FILING ...

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C. SUBMIT FORM 8867 IN THE MANNER REQUIRED; AND D. KEEP ALL FIVE OF THE FOLLOWING RECORDS FOR 3 YEARS FROM THE LATEST OF THE DATES SPECIFIED IN THE FORM 8867 INSTRUCTIONS UNDER DOCUMENT ...

2022 INSTRUCTION 1040 - INTERNAL REVENUE SERVICE

1. COMPLETE FORM 8962 TO CLAIM THE CREDIT AND TO RECONCILE YOUR ADVANCE CREDIT PAYMENTS. 3. INCLUDE FORM 8962 WITH YOUR FORM 1040, FORM 1040-SR, OR FORM 1040-NR. (DON T INCLUDE ...

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Form 8862 (REV. DECEMBER 2022) - INTERNAL REVENUE SERVICE

Form 8862 (REV. 12-2022) PAGE 3 PART IV AMERICAN OPPORTUNITY TAX CREDIT • ANSWER THE FOLLOWING QUESTIONS FOR EACH STUDENT FOR WHOM YOU ARE CLAIMING THE AOTC. IF YOU HAVE MORE THAN THREE ...

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Form 8867 PAID PREPARER'S DUE DILIGENCE CHECKLIST OMB ...

(SEE INSTRUCTIONS IF RELYING ON PRIOR YEAR EARNED INCOME.) IF CREDITS ARE CLAIMED ON THE RETURN, DID YOU COMPLETE THE APPLICABLE EIC AND/OR CTC/ACTC/ODC WORKSHEETS FOUND IN THE FORM 1040, ...

INSTRUCTIONS FOR FORM IT-272 IT-272-I - NYS DEPARTMENT OF ...

INSTRUCTIONS FOR FORM IT-272 CLAIM FOR COLLEGE TUITION CREDIT OR ITEMIZED DEDUCTION FULL-YEAR NEW YORK STATE RESIDENTS ONLY ... PAGE 2 OF 4 FORM IT-272-I (2022) AND GRANTS THAT MUST BE REPAYED ...

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EDUCATION CREDITS LESSON PLAN - IRS TAX FORMS

Form 8863, EDUCATION CREDITS (AMERICAN OPPORTUNITY AND LIFETIME : LEARNING CREDITS) FORM 8863 INSTRUCTIONS . INSTRUCTIONS FOR FORM 8863: FORM 13614-C . FORM 13614-C, INTAKE/INTERVIEW & ...

210045 42A740-S24 (10-21) - DEPARTMENT OF REVENUE

KENTUCKY EDUCATION TUITION TAX CREDIT ENTER NAME(S) AS SHOWN ON FORM 740 OR FORM 740-NP, PAGE 1. YOUR SOCIAL SECURITY NUMBER ENCLOSE WITH FORM 740 OR FORM 740-NP ...

GO TO WWW.IRS.GOV/FORM8863 FOR INSTRUCTIONS AND THE LATEST ...

Form 8863 DEPARTMENT OF THE TREASURY INTERNAL REVENUE SERVICE EDUCATION CREDITS ... FOR PAPERWORK REDUCTION ACT NOTICE, SEE YOUR TAX RETURN INSTRUCTIONS. CAT. No. 25379M FORM

FREE FORMS COURTESY OF FREETAXUSA

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2022 Form 1040

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FORM 8863-K EDUCATION KENTUCKY TUITION TAX ...

ENTER NAME(S) AS SHOWN ON FORM 740 OR FORM 740-NP, PAGE 1. YOUR SOCIAL SECURITY NUMBER ENCLOSE WITH FORM 740 OR FORM 740-NP. CAUTION: YOU . CANNOT. TAKE THE 2022 KENTUCKY ...

Form 8917 (REV. JANUARY 2020) - INTERNAL REVENUE SERVICE

TAKE BOTH AN EDUCATION CREDIT FROM FORM 8863 AND THE TUITION AND FEES DEDUCTION FROM THIS FORM FOR THE . SAME STUDENT . FOR THE SAME TAX YEAR. BEFORE YOU BEGIN: . TO SEE IF YOU QUALIFY FOR THIS ...

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EDUCATIONAL INSTITUTION INFORMATION (SEE INSTRUCTIONS) A. NAME OF FIRST EDUCATIONAL INSTITUTION (1) ADDRESS. NUMBER AND STREET (OR P.O. BOX). CITY, TOWN OR POST OFFICE, STATE, AND ZIP CODE. IF A ...

2025 Form 8863 - INTERNAL REVENUE SERVICE

FORM 1040; IRS.GOV/PUB501 FOR PUB. 501; IRS.GOV/W4 FOR FORM W-4; AND IRS.GOV/SCHEDULEA FOR SCHEDULE A (FORM 1040), FOR EXAMPLE, AND SIMILARLY FOR OTHER FORMS, PUBS, AND SCHEDULES FOR ...

FORM 8863-K EDUCATION K T ENTUCKY UITION TAX...

KENTUCKY EDUCATION TUITION TAX CREDIT ENTER NAME(S) AS SHOWN ON FORM 740 OR FORM 740-NP, PAGE 1. YOUR SOCIAL SECURITY NUMBER ENCLOSE WITH FORM 740 OR FORM 740-NP ...

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FOR PAPERWORK REDUCTION ACT NOTICE, SEE YOUR TAX RETURN INSTRUCTIONS. CAT. No. 25379M Form . 8863 (2023) Form 8863 (2023) ... DID THE STUDENT RECEIVE FORM 1098-T FROM THIS INSTITUTION FOR ...

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2022 Form 1098-T - INTERNAL REVENUE SERVICE

INSTRUCTIONS FOR STUDENT YOU, OR THE PERSON WHO CAN CLAIM YOU AS A DEPENDENT, MAY BE ABLE TO CLAIM AN EDUCATION CREDIT ON FORM 1040 OR 1040-SR.

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EDUCATIONAL INSTITUTION INFORMATION (SEE INSTRUCTIONS) A. NAME OF FIRST EDUCATIONAL INSTITUTION (1) ADDRESS. NUMBER AND STREET (OR P.O. BOX). CITY, TOWN OR POST OFFICE, STATE, AND ZIP CODE. IF A ...

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2024 SCHEDULE 3 (FORM 1040) - INTERNAL REVENUE SERVICE

SCHEDULE 3 (FORM 1040) 2024 ADDITIONAL CREDITS AND PAYMENTS DEPARTMENT OF THE TREASURY INTERNAL REVENUE SERVICE ATTACH TO FORM 1040, 1040-SR, OR 1040-NR.

2024 Form 4868 - INTERNAL REVENUE SERVICE

FORM 4868. GENERAL INSTRUCTIONS . PURPOSE OF FORM . USE FORM 4868 TO APPLY FOR 6 MORE MONTHS (4 IF "OUT OF THE COUNTRY" (DEFINED LATER UNDER . TAXPAYERS WHO ARE OUT OF THE COUNTRY) AND A ...

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