



2023 Individual Tuition Tax Credit Contribution Form

Mail to: SDSA - 550 W Warner Rd, Chandler, AZ 85225
or email to: sarah@stdomsavio.com

Donor Information

Name: _____ Address: _____
City: _____ State: _____ Zip Code: _____ Phone: _____ Email: _____

Filing Information

Donation is to be claimed for tax year: 2023 2024 (Donations made between April 19th, 2023 and December 31st, 2023 qualify for the current tax year only. Donations made from January 1st, 2024 through April 15th, 2024 must indicate the tax year to which they should be applied.)

Filing status on my income tax return:

Single Married filing jointly Married filing separate Unmarried head of household

Donation Information

2023 maximum annual donation for Original tax credit is \$655 (single/ married filing separately) or \$1,308 (married filing jointly). 2023 maximum annual donation for PLUS tax credit is \$652 (single/ married filing separately) or \$1,301 (married filing jointly). **Total credits for both equal \$1,307 (single/ married filing separately) or \$2,609 (married filing jointly).** Donor must maximize the Original tax credit before donated funds qualify for PLUS tax credit.

I have already donated to another private school through an STO organization for the same tax year that I am designating for this donation (*not public school or working poor*). If yes, how much and to which school? _____

Original: \$ _____ PLUS: \$ _____ Total Donation: \$ _____

I'd like to recommend a specific SDSA student for this scholarship: _____

Check enclosed & made payable to **Arizona Private Education Scholarship Fund**. Check #: _____

Please charge my credit card: Visa Mastercard Discover American Express

Credit card # _____ Expiration Date _____ CVV _____ Billing Zip Code: _____

Name as it appears on card: _____

Signature _____ Date _____

How Does It Work?

- 1.) Complete this form and mail or email it to SDSA.
- 2.) SDSA will submit all information to Arizona Private Education Scholarship Fund (APESF) on your behalf.
- 3.) APESF will mail you a receipt. To claim your dollar-for-dollar tax credit, give your receipt to your tax advisor or complete forms 301, 323, and 348 to include with your tax return.

How Will My Donation Be Used?

Your donation will supplement the tuition of a child at St. Dominic Savio Academy (SDSA) in need of financial aid. All tax credit donations will be directed toward St. Dominic Savio Academy's school fund, unless specified to benefit a specific student. Students receiving from the scholarship fund are selected by APESF and SDSA based on qualifying financial need.

Notice: A School Tuition Organization cannot award, restrict, or reserve scholarships solely on the basis of a donor's recommendation. A taxpayer may not claim a tax credit if the taxpayer agrees to swap donations with another taxpayer to benefit either taxpayer's own dependent. (A.R.S. 43-1089)

Arizona Private Education Scholarship Fund is a DOR certified Corporate School Tuition Organization. EIN: #86-0958161

550 W WARNER RD, CHANDLER, AZ 85225 | 480-659-5456 | WWW.STDOMSAVIO.COM

Frequently Asked Questions

Arizona Individual Tuition Tax Credit

What is it?

The Arizona Individual Tuition Tax Credit is a tuition credit program, established in 1997, that allows Arizonans to redirect their tax dollars to help children have a choice in education. You can donate your state taxes to benefit children who are currently enrolled in a private school that qualifies for a scholarship from this credit.

What is Arizona Private Education Scholarship Fund?

Arizona Private Education Scholarship Fund (APESF) is a DOR-certified Corporate School Tuition Organization. Its purpose is to assist children in receiving an Arizona tuition scholarship to attend the private school of their choice. Scholarships are given from the contributions of AZ taxpayers who use the tuition tax credit program. To donate directly online, visit <https://apesf.org/donors/>

Do I qualify?

All Arizona taxpayers qualify for a tax credit up to \$1,307 for single/ married filing separately taxpayers or \$2,609 for married couples filing jointly. You do not need to have a child enrolled in a school to receive the credit. You can give to multiple tax credits (public school, working poor, other private school) and still get the credit as long as it does not exceed your tax liability.

How much can I contribute?

2023 maximum annual donation for Original tax credit is \$655 (single/ married filing separately) or \$1,308 (married filing jointly). 2023 maximum annual donation for PLUS/Switcher tax credit is \$652 (single/ married filing separately) or \$1,301 (married filing jointly). **Total credits for both equal \$1,307 (single/married filing separately) or \$2,609 (married filing jointly).** Donor must maximize the Original tax credit before donated funds qualify for PLUS/Switcher tax credit.

What if I owe the state a remaining balance?

Your Tax Credit contribution will provide you with a dollar-for-dollar credit on your state taxes. For example, if you have a remaining state tax liability of \$1,800, since you contributed a \$555 2023 Tax Credit, you immediately reduce that figure to \$1,245.

What if the state owes me a refund?

Your state refund will be increased by the dollar-for-dollar amount of your Tax Credit contribution. For example, if you are due a refund from the state of \$200, since you contributed a \$555 2023 Tax Credit, you immediately increase that figure to \$755. **(Note: this is true if you have not exceeded your tax liability. Speak to your tax advisor to check.)**

Can my family, friends, and coworkers make a contribution to SDSA through TOPs for Kids?

Yes! As long as they pay taxes to the state of Arizona, they can take full advantage of the Tax Credit program. There is no need to have a child at the school.

Are there any restrictions?

Yes. You could have a state tax liability of less than the Original and PLUS tax credit amounts if you have a very low taxable income (for example, if you are a retiree). Also, with the other tax credits available (for example, public school or working poor) you might end up going beyond your tax liability. **If in doubt, check with a tax advisor.**

Other questions? Email Sarah Siegler, Development Director, at sarah@stdomsavio.com or call 480-659-5456.