

START HERE – if you have not already made your 2018 private school tax credit donation.

Step 1. **Determine how much you would like to donate.** You can donate your tax liability, or the maximum set by the state. The maximums set by the state for 2018 are \$2,213 if you are married filing jointly, and \$1,107 if you are filing single.

If you are uncertain of your tax liability, one option is to estimate your liability by looking at last year's tax form. Another option is to complete your taxes on turbotax without making the donation (to see what your liability is), then rework turbotax to reflect your donation. (Your tax liability will show on line 47 of your state tax form).

Step 2. **Make your donation** by going to www.arizonatuitionconnection.com or by calling us at: 480-409-4106

You can recommend a student or school receive those funds.

Remember, your tax liability is not what you owe when you file your taxes, but is the total amount of taxes you pay the state for the year (line 47 of your state tax form).



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The nice thing is that turbotax easily walks you through the process. This sheet offers some tips along the way.

As you move through the software for state taxes, you need to **check the 3rd box, NOT THE 1st BOX** in this section.

School Tax Credits

Check any that apply:

- I donated to an Arizona **public** school by April 15, 2019. [See Qualifications](#)
- I have a credit carryover for contributions to **public** schools from 2017.
- I donated to an Arizona **private** school by April 15, 2019. [See Qualifications](#)
- I have a credit carryover for contributions to **private** schools from 2017.
- None** of the above

In this section you will need to **fill in Arizona Tuition Connection. NOT THE SCHOOL.**

If your receipt says the date of your donation was in 2018, then you will fill in your full donation amount where the blue arrow is. If your donation was between 1/1/19 and 4/15/19 you will fill in your full donation amount where the red arrow is. (see below)

Private School Tuition Contributions

Enter the following information for the **private school tuition organization** you contributed to in 2018. You can also claim contributions made before April 15, 2019 on your 2018 tax return.

| | |
|--|-------------------------------------|
| Organization Name | Arizona Tuition Connection |
| Address | 11445 E Via Linda #2-145 |
| City | Scottsdale |
| State | AZ-Arizona |
| Zip Code | 85259 |
| Contributions in 2018 | <input type="text"/> ← |
| Contributions made from 01/01/2019 to 04/15/2019 | <input type="text" value="2213"/> ← |

The software will automatically split your donation between forms 323 and 348 (shown below). Unless you are carrying credits forward from a previous year, this information should match your receipt from us, and you do not have to change these numbers.

Confirm Credit Amounts to Claim this Year

Contributions to Private School Tuition Organizations (Form 323)

Unused amounts of this credit may be carried forward for five years.

Note: You can't claim credits that are more than your Arizona tax.

| Year of Original Credit | Credit Available | Credit Claimed in 2018 | Carryover to 2019 |
|-------------------------|------------------|------------------------|-------------------|
| 2013 | \$0 | \$0 | \$0 |
| 2014 | \$0 | \$0 | \$0 |
| 2015 | \$0 | \$0 | \$0 |
| 2016 | \$0 | \$0 | \$0 |
| 2017 | \$0 | \$0 | \$0 |
| 2018 | \$1,110 | 1,110 | \$0 |
| Total | | \$1,110 | |

Confirm Credit Amounts to Claim this Year

Excess Contributions to Private School Tuition Organizations (Form 348)

Unused amounts of this credit may be carried forward for five years.

Note: You can't claim credits that are more than your Arizona tax.

| Year of Original Credit | Credit Available | Credit Claimed in 2018 | Carryover to 2019 |
|-------------------------|------------------|------------------------|-------------------|
| 2013 | \$0 | \$0 | \$0 |
| 2014 | \$0 | \$0 | \$0 |
| 2015 | \$0 | \$0 | \$0 |
| 2016 | \$0 | \$0 | \$0 |
| 2017 | \$0 | \$0 | \$0 |
| 2018 | \$1,103 | 1,103 | \$0 |
| Total | | \$1,103 | |

Once completed, information from forms 323 and 348 are automatically added to form 301 along with any of your other Arizona Tax Credits you have made, and finally be listed on line 51 of your state tax form. There you will see how it lowers your tax liability.

Call us! We are here to help: 480-409-4106

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 TAXPAYERS OWN DEPENDENT.

TIPS FOR CLAIMING YOUR PRIVATE SCHOOL TAX CREDIT ON TURBOTAX

