

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.

# TIPS FOR CLAIMING YOUR PRIVATE SCHOOL TAX CREDIT ON TURBOTAX

## 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 2020	Carryover to 2021
2015	\$0	\$0	\$0
2016	\$0	\$0	\$0
2017	\$0	\$0	\$0
2018	\$0	\$0	\$0
2019	\$0	\$0	\$0
2020	\$1,186	<input type="text" value="1,186"/>	\$0
<b>Total</b>		<b>\$1,186</b>	

## 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 2020	Carryover to 2021
2015	\$0	\$0	\$0
2016	\$0	\$0	\$0
2017	\$0	\$0	\$0
2018	\$0	\$0	\$0
2019	\$0	\$0	\$0
2020	\$1,179	<input type="text" value="1,179"/>	\$0
<b>Total</b>		<b>\$1,179</b>	



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 your state tax form.

**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.

### 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 the 2020 tax year are \$2,365 if you are married filing jointly, and \$1,183 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.

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. Your tax liability will show on the summary provided by TurboTax.

#### Taxable Income

Federal Adjusted Gross Income	\$100,000
Less: Standard Deduction	\$24,800
Plus: Arizona Additions	\$0
Less: Arizona Subtractions	\$0
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Arizona Taxable Income	\$75,200

#### Taxes and Credits

Income Tax	\$2,103
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### Step 2. Make your donation, before filing your taxes.

Make your donation by going to [www.arizonatuitionconnection.com](http://www.arizonatuitionconnection.com) or by calling us at: 480-409-4106

You can recommend a student or school receive those funds.

### Step 3. Take the Credit.

As you move through the software for state taxes, you need to **check the 4th box, NOT THE 1<sup>st</sup> BOX** in this section.

#### School Tax Credits

Check any that apply:

- I donated to an Arizona **public** school by April 15, 2021. [See Qualifications](#)
- I have a credit carryover for contributions to **public** schools from 2019.
- I claimed a credit for 2020 contributions to **public** schools in 2019.
- I donated to an Arizona **private** school by April 15, 2021. [See Qualifications](#)
- I have a credit carryover for contributions to **private** schools from 2019.
- I claimed a credit for 2020 contributions to **private** schools in 2019.
- 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 2020, then you will fill in your full donation amount where the red arrow is. If your donation was between 1/1/21 and 4/15/21 you will fill in your full donation amount where the blue arrow is. (see below)

#### Private School Tuition Contributions

Enter the following information for the **private school tuition organization** you contributed to in 2020. You can also claim contributions made before April 15, 2021 on your 2020 tax return.

Organization Name	<input type="text" value="Arizona Tuition Connection"/>
Address	<input type="text" value="11445 E Via Linda #2-145"/>
City	<input type="text" value="Scottsdale"/>
State	<input type="text" value="AZ-Arizona"/>
Zip Code	<input type="text" value="85259"/>

Contributions in 2020	<input type="text" value="0."/>	
Contributions made from 01/01/2021 to April 15, 2021	<input type="text" value="2,365.00"/>	