



February, 2013

Dear Friends of The Joseph Sams School:

Our 2012-2013 school year is continuing to be a busy and productive one for the children we serve at The Joseph Sams School. As you are aware, many of our families need and receive scholarship funds enabling them to access the necessary, yet costly, qualified special education and therapeutic services their children desperately need to reach their developmental and academic potential.

Once again, we urge you to participate in the **Apogee Georgia Choice Scholarship Program** – a program authorized by the State of Georgia allowing you to redirect a portion of your tax liability (money that will otherwise go to the State).

To provide you with a clearer understanding of the Apogee Scholarship Fund, we have attached an explanation of the program which outlines the benefits to both you and the School. Also included is information on how to participate along with the necessary forms you must complete. It is a simple process!

This past year, several of our supporters donated to the program, generating over \$48,250 in scholarship funds for children. If you were once of these supporters, we thank you and hope you will participate again this year. If you did not participate last year, we hope you will seize the opportunity to contribute!

Apogee Scholarship Funds have been used to assist children transitioning from the public sector as well as young children with disabilities of pre-k, kindergarten, or first grade age whose families choose JSS over public school options. These families could not have accessed the quality programming at JSS without scholarship assistance for their children.

Thank you for considering this important and beneficial scholarship program. Please visit www.apogeescholarships.org for additional information. If you have further questions, contact Amy Murray, at JSS, via phone (770-461-5894) or email (amymurray@josephsamsschool.org).

Your participation and support are greatly appreciated. Every day, we see how the GA tax credit program is changing and improving lives by giving children the opportunity to receive the education that best fits their needs. We hope you will help us reach this year's goal of \$50,000!

Sincerely,
Amy S. Murray
Executive Director



**PARTICIPATION FORM
2013**

How do I participate?

1. Complete this form
2. **Sign the 2nd Page under Section C of Form IT-QEE-TP1 where it says "signature of contributor"**
*** we must have both this form and the signed TP1 form to complete the process*
3. Write a check made payable to "Apogee Scholarship Fund" or pay by credit card or online check on Apogee's website
4. Mail it all to Apogee (see below). We will take care of the rest.

Apogee Scholarship Fund | 3330 Cumberland Boulevard, Suite 400 | Atlanta, GA 30339
scholarships@apogeescholarships.org | P 404.419.7127/23 | F 404.419.7101

Participant Name

SSN

Spouse Name

SSN

Address

Phone Number

City State Zip Code

Date

Email

School Name(s)

*Any contact information provided will only be used to contact you regarding your tax credit redirection

Tax Credit Request amount

Filing Status (please check one)

- Individual (\$1,000 max)
- Married Filing Jointly (Max \$2,500)
- Married Filing Separate (Max \$1,250 per)
- C-Corp. (Max 75% of GA tax liability)
- S-Corp (same as individual filing status)
- Trust (Max 75% of GA tax liability)

* Once approval is secured, payment must be made to Apogee within 60 days of the approval date indicated on the DOR approval letter.

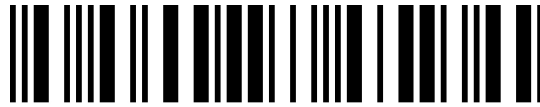
* Please be sure to include all spouse information if filing jointly.

DON'T FORGET TO SIGN THE 2nd PAGE OF THE TP1 FORM

Apogee will electronically submit your TP1 application to the DOR

The DOR will not process your tax credit without this signature

DOR has 30 days to provide both the taxpayer and the SSO with a copy of the approval notice.
Apogee will not deposit payments until the approval notice has been secured.



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Georgia Form IT-QEE-TP1 (Last Rev. 8/11)

Qualified Education Expense Credit Preapproval Form

Georgia Department of Revenue Version 1

Please print your numbers like this in black or blue ink:



This form is the first step in applying for the income tax credit for qualified education expenses. The form is filed by the taxpayer and is used to request preapproval of an intended contribution to a student scholarship organization.

Enter for Contributor:

- Individual filing single or head of household, Individual filing a married joint return, Individual filing married separate return, C Corporation or trust, Subchapter S corporation for Georgia purposes, partnership, or limited liability company.

First Name or Name of Entity, MI, Taxpayer Identification Number

DEPARTMENT USE ONLY

Last Name if Individual, Suffix

If individual filing joint, first name of joint filer, MI, If individual filing joint, I.D. # of joint filer

Last Name of Joint Filer, Suffix

Address (Number and Street or P.O. Box)

City, State, Zip Code

Tax Year End of Contributor, Calendar Year in which contribution will be made

Contact Person (for contributions by entities), Telephone Number

- The contribution must be preapproved... The taxpayer must add back to Georgia taxable income... The tax credit shall not be allowed if the taxpayer designates... The student scholarship organization must be on the Department of Education's website...

A. CONTRIBUTION AMOUNT

- 1. The amount of the contribution the taxpayer intends to make... 2. [For corporate and trust contributors only] Enter 75% of the corporation's or trust's estimated income tax liability... 3. Name of student scholarship organization... 4. Taxpayer I.D.# of student scholarship organization...



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Georgia Form IT-QEE-TP1 (Last Rev. 8/11)

Qualified Education Expense Credit Preapproval Form

Georgia Department of Revenue Version 1

Taxpayer Identification Number

Form fields for Taxpayer Identification Number

B. ADDITIONAL INFORMATION FOR CONTRIBUTORS WHICH ARE SUBCHAPTER S CORPORATIONS FOR GEORGIA PURPOSES, PARTNERSHIPS, OR LIMITED LIABILITY COMPANIES

The contribution limits for these entities are calculated separately for each shareholder, partner, or member. As such on a separate schedule, the contributor must provide the following information for each shareholder, partner, or member.

- 1. Name, address and taxpayer identification number
2. Type of taxpayer (i.e. corporation, individual, etc.)
3. If individual, filing status (joint, married filing separate, single, or head of household)
4. If individual filing a joint return, the name and identification number of the joint filer
5. If corporation, 75% of estimated GA income tax liability
6. Tax Year end
7. Profit/loss percentage
8. Amount of intended contribution allocated to each shareholder, partner, or member based on the profit/loss percentage.

C. CERTIFICATION BY APPLICANT

Applicant certifies that all information contained above is true to his/her best knowledge and belief and is submitted for the purpose of obtaining preapproval from the Commissioner.

Date: Form fields for date

Applicant: Printed Name of Contributor (individual or entity)

Form fields for Applicant Name



Signature of Contributor (if an entity, an authorized officer or tax matters person)

If Contributor is an entity: Printed Name and Title of Person Signing for Entity:

Name: Form fields for name

Title: Form fields for title

Phone Number: Form fields for phone number

Submit page 1 and page 2 to: Georgia Department of Revenue, Qualified Education Expense Credit, 1800 Century Blvd NE, Suite 8107, Atlanta, GA 30345

D. FOR DEPARTMENT USE ONLY

DATE RECEIVED

Form fields for DATE RECEIVED

Based on the fifty million dollar cap and your intended contribution amount, you have been preapproved and

allocated Form fields of qualified education expense credit for calendar

year Form fields Approved by Date Form fields