



DONOR GUIDE



STEP-BY-STEP GUIDE TO MAKE YOUR TAX CREDIT GIFT

INSTRUCTIONS FOR INDIVIDUAL DONORS

PART 1: CREATING MY ALABAMA TAXES ACCOUNT

If this is your first time claiming an income tax credit, you will need to create a My Alabama Taxes (MAT) account through the Alabama Department of Revenue website.

**You may skip this step and login if you have claimed tax credits in the past.*

To set up a MAT account, you will need:

- Your social security number
- Your Alabama Adjusted Gross Income (AGI) from your previous year's state tax return. Your federal AGI will not work.

Step 1: Go to myalabamataxes.alabama.gov and click **Create a My Alabama Taxes account** in the Sign in to MAT box.

Step 2: From the drop-down box, select *Individual Income Tax* and enter your social security number, your last name, and your previous year's Alabama AGI. Click Next.

Step 3: Choose a username, a password, and your password recovery question and answer. Click Next.

Note – Please record your username and password somewhere safe. You will need this again next year, and we are unable to retrieve lost passwords.

Step 4: Enter your personal contact information. Click Submit.

Step 5: Before you leave the final screen, we suggest printing the final confirmation screen with your login details.

PART 2: REGISTERING YOUR DONATION

To claim your tax credit, you will be using the My Alabama Taxes (MAT) portal on the Alabama Department of Revenue website.

Step 1: Go to myalabamataxes.alabama.gov. Sign in using your username and password. You may be prompted to enter a security code to verify your identity.

Step 2: On your home screen, scroll to the Tax Incentives section and select Manage Tax Incentives. On the next page, under Scholarship Granting Organization Credit, click *Report a Donation to an SGO (Scholarship Granting Organization)*.

Step 3: Enter the following information:

- Donor Name
- Address

- Select “Click here to enter your address” and fill out Address Line 1, City, State, and ZIP.
- Then, select “Click here to verify” Choose the “Verified” option by clicking “Select this address” on the right side of your screen. If successful, you will now have a green check and “Verified” at the bottom of the box. Click Save.
- Phone Number
- SGO Name: This will be a drop-down box. Please select the last option: **SCHOLARSHIPS FOR KIDS, INC.**
- Donation Amount
- Donation Date
- Click Next

Step 4: Write a check for your exact donation amount **made out to Scholarships for Kids**. Mail your check within 30 days, or if possible, the same day:

Scholarships for Kids, Inc.
P.O. Box 10204
Birmingham, AL 35202

Important Notes About Checks: Checks must be for the same amount as the donation amount entered on MAT and must be written from your personal account.

Tax Receipts: Once Scholarships for Kids receives and processes your check, they will verify your tax credit on the ADOR website and send you a receipt. After your donation is verified, the Department of Revenue will send you a separate Alabama Tax Credit Receipt.

INSTRUCTIONS FOR PASS-THROUGH ENTITIES

Making a donation to a Scholarship Granting Organization through a pass-through entity, then claiming an individual tax credit against individual Alabama State income taxes, requires just a few simple steps.

PART 1: CREATE A MY ALABAMA TAXES ACCOUNT

You must first register your entity with the online portal of the Alabama Department of Revenue called My Alabama Taxes (MAT). Go to myalabamataxes.alabama.gov to do so.

*You may skip this step and log in if you have already registered your entity.

Note: If your pass-through entity is already registered (ie, already has a Business Privilege Tax Account), the Alabama Accountability Act option can simply be added to its existing registration.

PART 2: REGISTER YOUR DONATION

To claim your tax credit, you will be using the My Alabama Taxes (MAT) portal on the Alabama Department of Revenue website.

Step 1: Go to myalabamataxes.alabama.gov. Sign in with your username and password. You may be prompted to enter a Security Code to verify your identity.

Step 2: On your home screen, you will see a Tax incentives box. Choose Manage Tax Incentives.

Step 3: Select **Report a Donation to an SGO (Scholarship Granting Organization)** in the **Scholarship Granting Organization Credit** box.

Step 4: Enter the following information:

- Entity Name
- Address
 - Select “*Click here to enter your address.*” Fill out the Address Line 1, City, State, and ZIP.
 - Then, select “*Click Here to Verify*”. Choose the “*Verified*” option by clicking “*Select this address*” on the right side of your screen. If successful, you will now have a green check and “*Verified*” at the bottom of the box. Click Save.
- Phone Number
- Email
- SGO Name: This will be a drop-down box. Please select the last option: **SCHOLARSHIPS FOR KIDS, INC.**
- Donation Date
- Donation Amount
- Click Next
- Check the agreement box and then click *Submit*

PART 3: MAKE AND DOCUMENT YOUR DONATION

Step 1: Write a check for your exact donation amount **made out to Scholarships for Kids**. Include a note saying you are a friend of Montgomery Christian School. Although donations cannot be restricted to a specific school, a note will help ensure MCS students receive the scholarships they need.

Important notes about checks: Checks must be for the same amount as the donation amount entered on MAT and must be written from your entity account.

Checks should be sent to:

Scholarships for Kids, Inc.
PO Box 10204
Birmingham, AL 35202

Once the Check is received, Scholarships for Kids will verify the donation with the Department of Revenue and send you an acknowledgment letter through the mail.

Step 2: After receiving confirmation from the SGO, you must then submit a credit claim on your MAT account.

- Go to myalabamataxes.alabama.gov. Sign in with your username and password.
- Select *Pass-through Entity Account Type*.
- Select the *Submit a Credit Claim* link under the Tax Incentives section found at the bottom of your screen.
- Under Credit Type, select Alabama Accountability Act Credit – Scholarship Granting Organization (SGO).
- Complete the information requested for the credit claim (including): Credit Type, Filing Period, Credit Amount, and upload attachments. **Be sure to attach the confirmation letter received from the SGO**, then click *Next* and confirm the information is correct.
- Click *Submit*.



SCHOLARSHIPS
— *for KIDS* —

SCHOLARSHIPS FOR KIDS, INC.
P.O. BOX 10204, BIRMINGHAM, AL 35202
205-246-5613
SCHOLARSHIPSFORKIDS.ORG