



Edmond Public Schools Foundation, Inc.
Donor Agreement for Qualifying Oklahoma Equal
Opportunity Education Scholarship Act Contributions

Office use only

Submitted to OTC:

Date:

Pledges Received:

Date:

Date:

Commitment Complete:

Date:

Agreement Date: _____ Tax Year(s): _____

Individual(s) Donor Name: _____ SSN/EIN: _____

Contact: _____

Address: _____ Phone: _____

Donor Filing Status: ☐ Single/Married Filing Separately ☐ Married Filing Jointly

-or-

Company/Organization: _____ EIN: _____

Contact: _____

Address: _____ Phone: _____

Donor Filing Status: ☐ Qualified Business Entity

Purpose: The donor’s non-refundable contribution will be used to support educational services for Edmond Public Schools students that align with the strategic goals of the Edmond Public Schools Foundation.

Donation Amount & Frequency:

The donor will contribute \$_____ annually* for:

- ☐ 1 Year, which qualifies for a tax credit of up to 50%
- ☐ 2 Years, which qualifies for a tax credit of up to 75%

Payment schedule:

\$_____ Date:_____

\$_____ Date:_____

\$_____ Date:_____

\$_____ Date:_____

Deadlines: All contributions must be postmarked or made on or before December 31. Gifts must be reported to the OTC on January 10th, of the following year, to be credited in year donated. Contributions and this signed agreement should be mailed to **Attention: Deanna Boston, Edmond Public Schools Foundation, P.O. Box 30837 Edmond, OK 73003.**

Documentation: Edmond Public Schools Foundation, Inc. will submit required information to the Oklahoma Tax Commission as confirmation of the Donors’ eligibility for a tax credit under the Oklahoma Equal Opportunity Education Scholarship Act. Donor must also submit proof of donation to the Oklahoma Tax Commission when claiming the tax credit.

Important Tax Credit Information: The tax credit has a statewide cap of \$25,000,000 and a district cap of \$200,000 annually. If total credits claimed exceeds either cap, the credit to the taxpayer will be a proportionate share of the cap for the taxable year after allocation of any amount of credits not claimed by other eligible organizations and taxpayers under the Act. Credits earned but not allowed due to the application of the statewide cap will be considered suspended and authorized to be used in the next immediate tax year and applied to the next year’s statewide cap. Any credits authorized by the Act allowed but not used in any tax year may be carried over, in order, to each of the three (3) years following the year of qualification. All information provided by Edmond Public Schools Foundation is for information purposes only. Please contact your tax professional.

Donor agrees to make a financial contribution to the Edmond Public Schools Foundation that qualifies for an Oklahoma Equal Opportunity Education Scholarship Act tax credit based on the terms outlined in this document.

Donor Representative Signature: _____ Date: _____

Organization Representative Signature: _____ Date: _____