



The TurboTax® software will automatically split your donation between forms 323 and 348 as shown below. This information will match your donation tax receipt provided by APSTO unless you are carrying forward from a previous tax year.

Confirm Credit Amounts to Claim this Year

Contributions to Private Schools Tuition Organization (Form 323)

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

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

Year of Original Credit	Credit Available	Credit claimed in 2020	Carry over to 2021
2015	\$0	\$0	\$0
2016	\$0	\$0	\$0
2017	\$0	\$0	\$0
2018	\$0	\$0	\$0
2019	\$0	\$0	\$0
2020	\$0	\$1,183	\$0
		\$1,183	

Confirm Credit Amounts to Claim this Year

Contributions to Private Schools Tuition Organization (Form 348)

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

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

Year of Original Credit	Credit Available	Credit claimed in 2020	Carry over to 2021
2015	\$0	\$0	\$0
2016	\$0	\$0	\$0
2017	\$0	\$0	\$0
2018	\$0	\$0	\$0
2019	\$0	\$0	\$0
2020	\$0	\$1,179	\$0
		\$1,179	

Once completed, the information from forms 323 and 348 will be automatically added to Summary Form 301 along with any other Arizona Tax Credits you may have made, and then finally list this on line 51 of your state tax form.

Questions? Call 480-256-1001 or email info@APSTO.org

NOTICE: 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 taxpayer's own dependent.

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How to Claim Your Tuition Tax Credit on TurboTax®

APSTO

Arizona Private School Tuition Organization

CONTACT US

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Scottsdale, AZ 85254
Phone: 480-256-1001 | Fax: 480-256-1002
Email: info@APSTO.org | www.apsto.org



First Step: Decide how much you would like to donate

You may donate up to the maximum set by the state or your actual tax liability, whichever is less. The maximum for tax year 2020 is below.

Tuition Tax Credits	Original Credit Maximum	Switcher Credit Maximum	Tuition Credits Maximum
Married Jointly	\$1,186	\$1,179	\$2,365
Individual	\$593	\$590	\$1,183
Tax Forms	323 / 301	348 / 301	323 / 348 / 301

If you are uncertain what your liability is, you can look at last year's tax form. If you want to be more precise, you can complete your taxes on TurboTax® without making a donation to see what your liability is. Then, rework TurboTax® to reflect your donation.

Keep in mind that your state tax liability is not always what you owe when you file your taxes - it is the total amount you would owe if you didn't pay taxes throughout the year. Provided you stay within the combined maximum provided by the state (\$2,365 filing jointly and \$1,183 filing single) for your donation, you can carry forward any unused tax credits for up to an additional five years.

Next Step: Make your donation to the Arizona Private School Tuition Organization (APSTO)

There are three easy ways to donate:

- ✓ Online at our Donor Portal
- ✓ By Phone: (480) 256-1001
- ✓ By mailing in our Donation Form

The process is simple and will only take a few minutes. You can access our online donation portal or mail in the donation form by visiting us at APSTO.org. You can recommend a specific student(s) or school(s) to receive your donation funds.

Final Step: Claim your credit

As you progress through the software program for state taxes, you will come to "School Tax Credits". You will need to check the 3rd box indicated for "Private Schools" 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 to contributions to **public** schools from 2019.
- ☒ I donated to an Arizona **private** school by April 15, 2021. [See Qualifications](#)
- ☐ I have a credit carryover to contributions to **private** schools from 2019.
- ☐ None of the above.

When you reach the section for "Private School Tuition Contributions", you will need to fill in "APSTO."

- If your tax receipt from APSTO shows the date of your donation was made in 2020, then you will enter your full donation amount in the first box indicated by the blue arrow.

- If your tax receipt from APSTO shows your donation was made between 01/01/21 and 04/15/21, you will enter your full donation amount in the second box indicated by the red arrow.

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	APSTO
Address	6424 E. Greenway Parkway Suite 100
City	Scottsdale
State	AZ- Arizona
Zip Code	85254
Contributions in 2020	\$2,365
Contributions made from 01/01/2020 to 04/15/2021	