

Appendix I

EITC Business Applications

In regards to the Appendix I

Businesses that wish to apply for Personal Income Tax Credits for S Corporation Shareholders, or Partners in a General or Limited Partnership, may not apply for credits until July 8, 2011. Any applications for Personal Income Tax Credits received prior to July 8, 2011 will be denied. This restriction does not apply to year 2 of a 2 year applications, received between May 16 and June 30, 2011.

SO and EIO applications, one or both may be submitted, per type of organization that the business would like to make its contribution. The combined total may not exceed \$300,000 in tax credits.

Appendix I - SO

Business Application for Scholarship Organization Contribution

Appendix I - EIO

Business Application for Educational Improvement Organization Contribution

Appendix I - PKSO

Business Application for Pre-Kindergarten Scholarship Organization Contribution

Appendix I – PKSO may be submitted individually or with Appendix I - SO and/or Appendix I - EIO. The maximum tax credits that may be earned from an approved PKSO contribution may not exceed \$150,000 per year.

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Appendix I - SO

Application for Educational Improvement Tax Credits (Scholarship Org)

Business Name:		FEIN:	
Address:			
City:		State:	
Zip Code:		County:	
Business Description:		NAICS Code*:	
CEO Name:		CEO Title:	
Contact Name:		Contact Title:	
Contact Phone #:		Contact Fax #:	
Contact E-mail Address:			
Business Tax Year End (MM/DD):		PA Corporate Tax Account ID #:	— — — — - — — —

Please check if the information in the above selection differs from previous applications.
 Amount to be donated per year to a scholarship organization(s): \$ _____

Based on the contribution stated above, this application is for the following commitment:

- Year 1 of a 1 Year Commitment (75% Tax Credit)
- Year 1 of a 2 Year Commitment (90% Tax Credit)
- Year 2 of a 2 Year Commitment (90% Tax Credit)

Calculated amount of tax credits requested per year: \$ _____

If the contribution will be personal property or services, please check here and attach a separate typed page describing the property or service and appropriate information establishing the value of the contribution.

The EITC may be used against the following business taxes: Corporate Net Income Tax, Capital Stock Franchise Tax, Bank & Trust Company Shares Tax, Title Insurance Company Shares Tax, Insurance Premiums Tax and Mutual Thrift Institutions Tax.

S Corporations, General Partnerships or Limited Partnerships Only: In addition to earning credits for any of the six corporate taxes listed above, any 2 of a 2 year commitment submitted between May 16 and June 30 or year 1 application submitted on or after July 8 may request to pass credits through to the personal income tax of the shareholders or partners, per Section II of these guidelines. If the option is requested, the business may not submit this application between July 1 and July 7.

Does the applicant desire the option to pass the credits through to personal income tax?
 Yes No *(If neither option is selected, the pass through option will not be available)*

I hereby certify that all information contained herein is true and correct to the best of my knowledge. I acknowledge that tax credits will be awarded only for approved contributions made to Scholarship Organizations listed by the Department (DCED) at www.newPA.com/EITC. I am aware that contributions must be made within 60 days of the date on the approval letter and receipts must be forwarded to DCED by the business within 90 days of approval. Furthermore, I acknowledge that if I knowingly make false statement to obtain tax credits, I (company, entity and signer) may be subject to criminal prosecution.

Signature: _____

Date: _____

Print Name: _____

Title: _____

* A NAICS code search can be done at www.NAICS.com

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Appendix I - EIO

Application for Educational Improvement Tax Credits (Educational Improvement Org)

Business Name:		FEIN:	
Address:			
City:		State:	
Zip Code:		County:	
Business Description:		NAICS Code*:	
CEO Name:		CEO Title:	
Contact Name:		Contact Title:	
Contact Phone #:		Contact Fax #:	
Contact E-mail Address:			
Business Tax Year End (MM/DD):		PA Corporate Tax Account ID #:	__ - __ - __ - - - - -

Please check if the information in the above selection differs from previous applications.

Amount to be donated per year to a educational improvement organization(s): \$ _____

Based on the contribution stated above, this application is for the following commitment:

- Year 1 of a 1 Year Commitment (75% Tax Credit)
- Year 1 of a 2 Year Commitment (90% Tax Credit)
- Year 2 of a 2 Year Commitment (90% Tax Credit)

Calculated amount of tax credits requested per year: \$ _____

If the contribution will be personal property or services, please check here and attach a separate typed page describing the property or service and appropriate information establishing the value of the contribution.

The EITC may be used against the following business taxes: Corporate Net Income Tax, Capital Stock Franchise Tax, Bank & Trust Company Shares Tax, Title Insurance Company Shares Tax, Insurance Premiums Tax and Mutual Thrift Institutions Tax.

S Corporations, General Partnerships or Limited Partnerships Only: In addition to earning credits for any of the six corporate taxes listed above, any 2 of a 2 year commitment submitted between May 16 and June 30 or year 1 application submitted on or after July 8 may request to pass credits through to the personal income tax of the shareholders or partners, per Section II of these guidelines. If the option is requested, the business may not submit this application between July 1 and July 7.

Does the applicant desire the option to pass the credits through to personal income tax?

Yes No (If neither option is selected, the pass through option will not be available)

I hereby certify that all information contained herein is true and correct to the best of my knowledge. I acknowledge that tax credits will be awarded only for approved contributions made to Educational Improvement Organizations listed by the Department (DCED) at www.newPA.com/EITC. I am aware that contributions must be made within 60 days of the date on the approval letter and receipts must be forwarded to DCED by the business within 90 days of approval. Furthermore, I acknowledge that if I knowingly make false statement to obtain tax credits, I (company, entity and signer) may be subject to criminal prosecution.

Signature: _____ Date: _____

Print Name: _____ Title: _____ 9

* A NAICS code search can be done at www.NAICS.com

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Appendix I - PKSO

Application for Pre-Kindergarten Tax Credits

Business Name:		FEIN:	
Address:			
City:		State:	
Zip Code:		County:	
Business Description:		NAICS Code*:	
CEO Name:		CEO Title:	
Contact Name:		Contact Title:	
Contact Phone #:		Contact Fax #:	
Contact E-mail Address:			
Business Tax Year End (MM/DD):		PA Corporate Tax Account ID #:	— — — — - — — —

Please check if the information in the above selection differs from previous applications.

Amount to be donated per year to a Pre-K Scholarship organization(s): \$ _____

Pre-K Scholarship Tax Credits are calculated as follows: 100% credit for the first \$10,000 and 90% credit thereafter, up to a maximum tax credit of \$150,000.

Calculated amount of tax credits requested: \$ _____

If the contribution will be personal property or services, please check here and attach a separate typed page describing the property or service and appropriate information establishing the value of the contribution.

The EITC may be used against the following business taxes: Corporate Net Income Tax, Capital Stock Franchise Tax, Bank & Trust Company Shares Tax, Title Insurance Company Shares Tax, Insurance Premiums Tax and Mutual Thrift Institutions Tax.

S Corporations, General Partnerships or Limited Partnerships Only: In addition to earning credits for any of the six corporate taxes listed above, any 2 of a 2 year commitment submitted between May 16 and June 30 or year 1 application submitted on or after July 8 may request to pass credits through to the personal income tax of the shareholders or partners, per Section II of these guidelines. If the option is requested, the business may not submit this application between July 1 and July 7.

Does the applicant desire the option to pass the credits through to personal income tax?

Yes No (If neither option is selected, the pass through option will not be available)

I hereby certify that all information contained herein is true and correct to the best of my knowledge. I acknowledge that tax credits will be awarded only for approved contributions made to Pre-K Scholarship Organizations listed by the Department (DCED) at www.newPA.com/EITC. I am aware that contributions must be made within 60 days of the date on the approval letter and receipts must be forwarded to DCED by the business within 90 days of approval. Furthermore, I acknowledge that if I knowingly make false statement to obtain tax credits, I (company, entity and signer) may be subject to criminal prosecution.

Signature: _____ Date: _____

Print Name: _____ Title: _____

* A NAICS code search can be done at www.NAICS.com