



# MARKETABLE SECURITIES DONATION PAYMENT OPTION

Use this form if you want to make your donation payment by using marketable securities.

## Instructions for Mailing in Donation Payments

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1. Complete, save and print the electronic Invest in Kids Tax Credit Scholarship Donation Form (attached).
2. Email these two documents together to [donors@empowerillinois.org](mailto:donors@empowerillinois.org):
  - A copy of your completed Invest in Kids Tax Credit Scholarship Donation Form;
  - A copy of both sides of the Contribution Authorization Certificate (CAC) you received from the Illinois Department of Revenue.
3. Use the instructions below to make your marketable securities donation payment to Empower Illinois.

**Account Name:** Empower Illinois

**Account Number:** 001051000080

**To deposit any DTC-eligible security into a U.S. Bank Trust account:**

Including but not limited to Equities, Corporate and Municipal Bonds, Commercial Paper, Medium-Term Notes, Collateralized Mortgage Issues, and Zero Coupon Bonds

Instruct current custodian to deliver to: The Depository Trust Company

Participant Account 2803

For credit to account name and number referenced above

Ask your broker or bank to include your name (as the donor) in the comments section of the delivery notice.

**To deposit any Fed-eligible security:**

Including all Fed-eligible Bonds, Bills, Notes, and agencies, including GNMA's

Instruct current custodian to deliver to: Federal Reserve Bank of Cleveland

For: U.S. Bank, N.A., Trust

ABA 042-000-013

1050/TRUST

For Account Number: 001051000080

Ask your broker or bank to include your name (as the donor) in the comments section of the delivery notice.

If you need any assistance with this process or have questions about making a donation payment, please call 309-644-4524 or email [donors@empowerillinois.org](mailto:donors@empowerillinois.org).

# EMPOWER ILLINOIS

## INVEST IN KIDS TAX CREDIT SCHOLARSHIP

### DONATION FORM

#### Donor Taxpayer Information

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|              |           |          |  |
|--------------|-----------|----------|--|
| First Name   | Last Name |          |  |
| Address      |           |          |  |
| City         | State     | Zip Code |  |
| Phone number | E-mail    |          |  |

#### Tax Credit Donation Information

| <sup>(1)</sup> Designee(s) | <sup>(2)</sup> Contribution Authorization Certificate # | <sup>(3)</sup> Region<br>1 - 5 | <sup>(4)</sup> Designee. If none, enter Undesignated. | Amount |
|----------------------------|---|--------------------------------|---|--------|
| Designee #1                |   |                                |   |        |

**If your donation is over \$1,000 you may select up to three designees.**

|             |  |  |  |  |
|-------------|--|--|--|--|
| Designee #2 |  |  |  |  |
| Designee #3 |  |  |  |  |

**Total Tax Credit Donation**

***Please provide the following information to Empower Illinois about your marketable securities donation:***

|                           |               |                 |        |
|---------------------------|---------------|-----------------|--------|
| Expected Date of Transfer | Security Name | Security Ticker | Amount |
|---------------------------|---------------|-----------------|--------|

Brokerage Firm

Brokerage Contact/Phone

#### DONOR AUTHORIZATIONS

- 1) I authorize Empower Illinois to use any remaining balance of my account to fund scholarships for eligible students in the same school system as the school(s) I have selected.
- 2) If a balance remains at the school system, I authorize Empower Illinois to use the remaining balance of my account as undesignated funds to provide scholarships for eligible students.
- 3) I authorize Empower Illinois to share my donation information with designee(s) I selected.

*If your donation is \$25,000 or greater and you wish to designate to more than three organizations, please call 309-644-4524.*

## INSTRUCTIONS AND NOTES

Donations can be directed to schools that are recognized by the Illinois State Board of Education (ISBE) or in the process of being recognized by ISBE. However, only schools recognized by ISBE are eligible for donations to be used for student scholarships under the program. A complete list of schools can be found on the Empower Illinois [website](#). Schools marked “PENDING RECOGNITION” are in the process of being recognized by ISBE but are not yet recognized. Students who have received scholarship awards will not be allowed to use the scholarships at schools marked “PENDING RECOGNITION” until such schools have been recognized, including donations directed by donors for scholarships to such schools. There are no guarantees that schools marked “PENDING RECOGNITION” will receive recognition in the future. Donations directed to any school that is not recognized by ISBE by August 1, 2019 will be recharacterized as undesignated donations within the same region.

1. Enter one designee if your donation is less than \$1,000. If your donation is \$1,000 or greater, enter up to three designees. The list of designees can be found under Donors - Schools and Organizations by Region on the Empower Illinois website. Empower Illinois will direct your donation to the Schools or Organizations that you designate. You may also leave your donation Undesignated within the region found on your Contribution Authorization Certificate (CAC) issued to you by the Illinois Department of Revenue.
2. Enter your Contribution Authorization Certificate number(s).
3. Enter the Region designated on your Contribution Authorization Certificate, which you must select at the time you reserve your Illinois scholarship tax credit. For more information about Regions 1 - 5, go to [tax.illinois.gov/InvestInKids/Regions.htm](http://tax.illinois.gov/InvestInKids/Regions.htm).
4. Making an undesignated donation provides greater flexibility to Empower Illinois to direct your donation to eligible students. We also understand that you may desire to support certain Schools or Organizations. If you do not wish to designate your funds enter “Undesignated”; if you do wish to designate your donation enter the name of the School or Organization. A list of designees can be found at <https://empowerillinois.org/donors/schools-school-systems-scholarship-funds/>

# CHOOSING A REGION

There are 5 regions in the State of Illinois. When reserving your tax credit on the Illinois Department of Revenue (IDOR) website, it is important that you choose the region in which your designee(s) are located, **not** the region of your home address. For example, you may live in one region but you may want to designate Schools and Organizations outside the region in which you live. In that case, you must choose the region in which your designees are located when reserving your tax credit. If you wish to designate Schools and Organizations in different regions, you must reserve tax credits and be issued a separate Contribution Authorization Certificate for each region. You can choose multiple designees within each region if your donation is \$1,000 or more.

Information about choosing the region can be found here:

<http://www.revenue.state.il.us/InvestInKids/Regions.htm>.

To determine the region for your tax credit reservation:

- Locate your designee(s) [here](#).
- Determine the region in which your designee(s) are located;
- Enter your designee(s)' region when you reserve your tax credit on the IDOR website.

After you have made your tax credit reservation, the Contribution Authorization Certificate issued to you will show the region you have chosen.