



ANGEL SCHOLARSHIP FUND

*Turning taxes into tuition with the
Catholic Community Foundation*



YOUR TAXES. THEIR TUITION. OUR FUTURE.

WHAT IS THE ANGEL SCHOLARSHIP FUND?

The Catholic Community Foundation has established the **Angel Scholarship Fund** as a Scholarship Granting Organization to support our Catholic schools and students in the Diocese of Cleveland.



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WHAT IS THE ANGEL SCHOLARSHIP FUND?

This fund makes it easy to “turn tax dollars into tuition” by making a contribution to the **Angel Scholarship Fund** that may be eligible for a 100% tax credit on the donor’s State of Ohio income tax return.



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WHAT IMPACT DOES IT MAKE?

- **Directly impacts a family's ability to afford a Catholic education**
- **Helps provide a high quality Catholic education to more children**
- **Can be directed to any Catholic school in the Diocese of Cleveland**
- **Allows you to choose what you want your tax dollars to support**



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DATES TO REMEMBER:

CONTRIBUTE BY DECEMBER 31, 2023 —

FOR THE FUNDS TO BE AVAILABLE TO AWARD TO STUDENTS IN THE 2024-2025 SCHOOL YEAR.

CONTRIBUTE BY APRIL 15, 2024 —

FOR YOUR CONTRIBUTION TO BE ELIGIBLE TO CLAIM A 2023 TAX CREDIT. FUNDS WILL BE AVAILABLE TO AWARD TO STUDENTS IN THE 2025-2026 SCHOOL YEAR.



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Questions????



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HOW IT WORKS:

CLAIM YOUR DOLLAR FOR DOLLAR TAX CREDIT

EXAMPLE ONE OF OHIO TAX CREDIT SCENARIO*

INDIVIDUAL

Estimated Ohio Tax Liability	\$1,000
Tax Credit on \$750 donation to the Angel Scholarship Fund	-\$750
Ohio Tax Liability after Tax Credit	\$250

MARRIED, FILING JOINTLY

Estimated Ohio Tax Liability	\$2,000
Tax Credit on \$1,500 donation to the Angel Scholarship Fund	-\$1,500
Ohio Tax Liability after Tax Credit	\$500

*This tax credit scenario does not constitute income tax advice. Always consult with your tax professional for information on the impact of any charitable donation.



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HOW IT WORKS:

CLAIM YOUR DOLLAR FOR DOLLAR TAX CREDIT

EXAMPLE TWO OF OHIO TAX CREDIT SCENARIO*

INDIVIDUAL

Estimated Ohio Tax Liability	\$500
Tax Credit on \$500 donation to the Angel Scholarship Fund	-\$500
Ohio Tax Liability after Tax Credit	\$0

MARRIED, FILING JOINTLY

Estimated Ohio Tax Liability	\$1,000
Tax Credit on \$1,000 donation to the Angel Scholarship Fund	-\$1,000
Ohio Tax Liability after Tax Credit	\$0

*This tax credit scenario does not constitute income tax advice. Always consult with your tax professional for information on the impact of any charitable donation.



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THREE STEPS DESIGNATE YOUR 2023 PERSONAL TAX LIABILITY TO THE ANGEL SCHOLARSHIP FUND

Step 1:

Estimate your 2023 Ohio tax liability.

Step 2:

Make your donation to ASF.

Step 3:

Claim your scholarship tax credit when you file your 2023 State of Ohio income tax return.

HOW TO GIVE!



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TO FIND LAST YEAR'S STATE TAX LIABILITY, PULL OUT LAST YEAR'S STATE OF OHIO TAX RETURN.

2022 YOUR "TOTAL OHIO TAX LIABILITY" FOUND ON PAGE 2 IT1040 LINE 13

STEP 1

2022 Ohio IT 1040 Individual Income Tax Return



22000202 Sequence No. 2

SSN

7a. Amount from line 7 on page 1 7a.

8a. Nonbusiness income tax liability on line 7a (see instructions for tax tables)..... 8a.

8b. Business income tax liability – Ohio Schedule IT BUS, line 14 (include schedule)..... 8b.

8c. Income tax liability before credits (line 8a plus line 8b)..... 8c.

9. Ohio nonrefundable credits – Ohio Schedule of Credits, line 35 (include schedule)..... 9.

10. Tax liability after nonrefundable credits (line 8c minus line 9; if negative, enter zero)..... 10.

11. Interest penalty on underpayment of estimated tax (include Ohio IT/SD 2210)..... 11.

12. Unpaid use tax (see instructions)..... 12.

13. Total Ohio tax liability before withholding or estimated payments (add lines 10, 11 and 12)..... 13.

14. Ohio income tax withheld – Schedule of Ohio Withholding, part A, line 1 (include schedule and income statements)..... 14.

15. Estimated and extension payments (from Ohio IT 1040ES and IT 40P), and credit carryforward from last year's return..... 15.

16. Refundable credits – Ohio Schedule of Credits, line 41 (include schedule)..... 16.

17. **Amended return only** – amount previously paid with original and/or amended return..... 17.

18. **Total Ohio tax payments** (add lines 14, 15, 16 and 17)..... 18.

19. **Amended return only** – overpayment previously requested on original and/or amended return..... 19.

20. Line 18 minus line 19. Place a "-" in the box if negative..... 20.

If line 20 is MORE THAN line 13, skip to line 24. OTHERWISE, continue to line 21.

21. Tax due (line 13 minus line 20). If line 20 is negative, ignore the "-" and add line 20 to line 13..... 21.

22. Interest due on late payment of tax (see instructions)..... 22.

23. **TOTAL AMOUNT DUE** (line 21 plus line 22). **Include Ohio IT 40P** (if original return) or **IT 40XP** (if amended return) and make check payable to "Ohio Treasurer of State"..... **AMOUNT DUE** ▶ 23.

24. Overpayment (line 20 minus line 13)..... 24.

25. **Original return only** – portion of line 24 carried forward to next year's tax liability..... 25.

26. **Original return only** – portion of line 24 you wish to donate:

a. Wildlife Species b. Military Injury Relief c. Ohio History Fund

d. Nature Preserves/Scenic Rivers e. Breast/Cervical Cancer f. Wishes for Sick Children

Total.... 26g.

27. **REFUND** (line 24 minus lines 25 and 26g)..... **YOUR REFUND** ▶ 27.

Sign Here (required): I have read this return. Under penalties of perjury, I declare that, to the best of my knowledge and belief, the return and all enclosures are true, correct and complete.

▶ Primary signature _____ Phone number _____

▶ Spouse's signature _____ Date _____

Check here to authorize your preparer to discuss this return with the Department.

Preparer's printed name _____ Phone number _____

Preparer's TIN (PTIN) P

If your refund is \$1.00 or less, no refund will be issued. If you owe \$1.00 or less, no payment is necessary.

NO Payment Included – Mail to:
Ohio Department of Taxation
P.O. Box 2679
Columbus, OH 43270-2679

Payment Included – Mail to:
Ohio Department of Taxation
P.O. Box 2057
Columbus, OH 43270-2057

HOW TO GIVE!

STEP 2

OPTION 1: ONLINE

www.catholiccommunity.org/ANGEL-CONTRIBUTION

SCAN
ME



Amount

\$1,500

\$750

\$500

\$250

\$100

Other Amount

Process my gift

One Time

Select A School

Choose A School

Select A Parish

Choose Parish (Optional)

Spouse Name (Optional)

Spouse Name



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HOW TO GIVE!



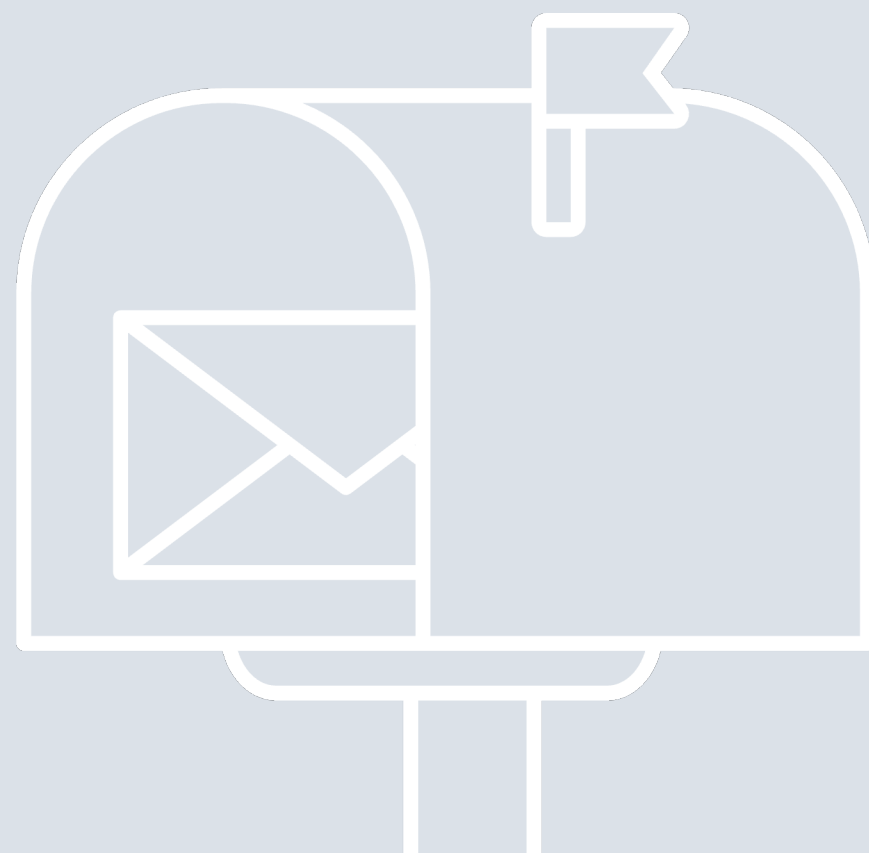
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STEP 2

OPTION 2: MAIL IN

Please make checks payable
to “ANGEL SCHOLARSHIP
FUND” (NOT ST ANGELA
MERICI)



NOTE



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2023 CONTRIBUTION FORM

PLEASE NOTE: Donations must be made by **April 15th 2024** to be eligible for a 2023 state tax credit.

Donor Information

First Name: _____ MI: _____
Last Name: _____
Spouse Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Email: _____
Parish: _____

THANK YOU!

We will share your contact information with the school so they are able to thank you for your support. I wish to remain anonymous

Donation

General Scholarship Fund for
Schools in Most Need: \$ _____
School of my choice:
_____ \$ _____
Total: \$ _____

Payment Information

I am paying by:
 Check (made payable to Angel Scholarship Fund)
 Credit Card:
 Visa Mastercard Discover AMEX
Card Number: _____
Expires: _____ CVV Code: _____
Signature: _____

Spouse Information (if additional donation)

First Name: _____ MI: _____
Last Name: _____
 Check if address is the same
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Email: _____
Parish: _____

THANK YOU!

We will share your contact information with the school so they are able to thank you for your support. I wish to remain anonymous

Spouse Donation

General Scholarship Fund for
Schools in Most Need: \$ _____
School of my choice:
_____ \$ _____
Total: \$ _____

Spouse Payment Information

Check if payment information is the same
I am paying by:
 Check (made payable to Angel Scholarship Fund)
 Credit Card:
 Visa Mastercard Discover AMEX
Card Number: _____
Expires: _____ CVV Code: _____
Signature: _____

or Monthly Contribution

Would you like to **STRETCH** your contribution into smaller monthly payments?
Register for monthly contributions at www.catholiccommunity.org/angel, email asinfo@dioceseofcleveland.org
or call our office for assistance at 216-696-6525 x 1680

COMPLETE AND MAIL CONTRIBUTION FORM TO:

Angel Scholarship Fund, Catholic Community Foundation • 1404 East Ninth Street • Cleveland, OH 44114

HOW TO GIVE!



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STEP 3

PART 1

In January of 2024, you will receive a letter from the Angel Scholarship Fund that will confirm your total donations for tax year 2023. This document needs to be included in your state tax filing to receive your state tax credit.



Mr. and Mrs. [REDACTED]
[REDACTED]
[REDACTED]

Thank you for your support of the Angel Scholarship Fund (ASF) in 2022. **This new tax receipt is being provided to verify that the contribution referenced below was made during the 2022 tax year.**

Please find your donation receipt below, along with confirmation that your gift was made to a Scholarship Granting Organization certified by the State of Ohio. Your contribution may qualify for the Ohio income tax credit for donations to Scholarship Granting Organizations as currently provided for by O.R.C. Section 5747.73. Please consult your tax advisor with questions.

Donation Receipt for 2022 Tax Year

Please retain a copy of this letter for tax purposes.

DONATION RECEIPT FOR 2022 TAX YEAR:

Account ID: [REDACTED]

Total Payment Amount: \$ 700.00

\$ 700.00
[REDACTED]

The above gift was made to the Scholarship Granting Organization of the Catholic Community Foundation (d/b/a Angel Scholarship Fund, Tax ID 87-3652751), a non-profit corporation certified by the Ohio Attorney General's Office as a Scholarship Granting Organization. The donor received no goods or services as a result of this contribution.

HOW TO GIVE!



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STEP 3

PART 2

Example from tax
year 2022 form.

LINE 15 USED IN 2022 TO
CLAIM YOUR TAX CREDIT



Many of these credits **must** be calculated using a worksheet and/or be supported by additional required documentation. See the instructions for worksheets and information on supporting documentation.

Nonrefundable Credits

- 1. Tax liability before credits (from Ohio IT 1040, line 8c)..... 1.
- 2. Retirement income credit (include 1099-R forms)..... 2.
- 3. Lump sum retirement credit (include a copy of the worksheet and 1099-R forms)..... 3.
- 4. Senior citizen credit (must be 65 or older to claim this credit)..... 4.
- 5. Lump sum distribution credit (include a copy of the worksheet and 1099-R forms)..... 5.
- 6. Child care & dependent care credit (include a copy of the worksheet)..... 6.
- 7. Displaced worker training credit (include a copy of the worksheet and all required documentation)..... 7.
- 8. Campaign contribution credit for Ohio statewide office or General Assembly..... 8.
- 9. Income-based exemption credit..... 9.
- 10. Total (add lines 2 through 9)..... 10.
- 11. Tax less credits (line 1 minus line 10; if negative, enter zero)..... 11.
- 12. Joint filing credit (see instructions for table). % times line 11, up to \$650..... 12.
- 13. Earned income credit..... 13.
- 14. Home school expenses credit (include copies of all required documentation)..... 14.
- 15. Scholarship donation credit (include copies of all required documentation)..... 15.
- 16. Nonchartered, nonpublic school tuition credit (include copies of all required documentation)..... 16.
- 17. Vocational job credit (include a copy of the credit certificate)..... 17.
- 18. Ohio adoption credit..... 18.
- 19. Nonrefundable job retention credit (include a copy of the credit certificate)..... 19.
- 20. Credit for eligible new employees in an enterprise zone (include a copy of the credit certificate)..... 20.
- 21. Grape production credit..... 21.
- 22. InvestOhio credit (include a copy of the credit certificate)..... 22.
- 23. Lead abatement credit (include a copy of the credit certificate)..... 23.
- 24. Opportunity zone investment credit (include a copy of the credit certificate)..... 24.

Do not write in this area; for department use only.

Questions????



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OUR 2023 GOAL:

\$100,000

WHAT WE RAISED IN 2022:

\$60,000+

**SCHOLARSHIPS AWARDED IN
2023- 2024 SCHOOL YEAR:**

40



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WHO DO I CONTACT?

CATHOLIC COMMUNITY FOUNDATION

1404 East Ninth Street,
Cleveland OH 44114

Phone:

(216) 696-6525

(800) 869-6525

Fred Roberts

Director of Development for Education

(216) 696-6525 x3310

Kaitlyn Novicky

Development Associate

(216) 696-6525 xx1680

ST. ANGELA MERICI PARISH ASF STAFF AMBASSADORS

Phone: (440) 333-2133

Ed Doubrava

business@samparish.org

Sue File

bookkeeper@samparish.org

Catherine Wunch

cwunch@samparish.org

Jennifer Fitzpatrick

dataprocessor@samparish.org

Suzanne Quinn

squinn@samparish.org



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WHO DO I CONTACT?



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Mark Corcoran

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Barb Moran

mor42008@gmail.com

Charlie Moran

moranchas@gmail.com



**OUR STUDENTS AND
STUDENT FAMILIES ARE
EXTREMELY GRATEFUL
FOR YOUR KINDNESS AND
GENEROSITY**



THANK YOU



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