

Whether you contributed last year or are a first-time donor, here is what you need to know to complete the donation process.

If you have not activated an account with the Illinois Department of Revenue, you need to:

- 1. Request Letter ID
- 2. Activate Your Account
- 3. Reserve Your Credit
- 4. Make Your Donation

If you have activated an account with the Illinois Department of Revenue, you can skip to page 4.

REQUEST LETTER ID

Log on to mytax.illinois.gov.

- If you already have an account, enter your username and password to verify.
- If you do NOT have an account, scroll down to the 'Individuals' box on the left.
- 02. Click on 'Request a Letter ID.'

03. Enter your Social Security Number and one of the following:

- IL-PIN
- Most Recent Adjusted Gross Income
- IL Driver's License Number
- IL State Identification Number •
- 04. Click 'Submit' and enter and confirm your email address; then click 'OK' to submit and receive vour confirmation.

05. Your Letter ID will be mailed to the address on your last year's tax return. You should receive it within 7-10 business days.





AFTER YOU HAVE RECEIVED YOUR LETTER ID ACTIVATE YOUR ACCOUNT

06. Log on to mytaxillinois.gov and click 'Sign Up.'



- 7. Select SSN, enter your Social Security Number and click submit; then click 'Yes' to begin activating your account.
 - Enter your Letter ID and either your Individual IL Pin or your most recent Adjusted Gross Income (AGI). If you choose your IL PIN, click on 'Look Up My IL PIN' and go to Step 8. If you choose your most recent AGI, go directly to Step 9.

New Activation				_
Activation Summ	ary			
Select the taxpayer ID type	e you want to use to activate you	r MyTax Illinois account:		
O FEIN	SSN *			
SSN	Required			
O Sales Account Id				
C License Number				
Cancel		\odot	< Previous Submit	
			ys. If you do not have a letter ID, you cannot complete	e this
			rs. If you do not have a letter ID, you cannot complete inois home screen to have a letter sent to you.	e this
request at this time. Use the "Re Letter ID *				e this
request at this time. Use the "Re Letter ID * Required Provide ONE of the following:				e this
request at this time. Use the "Re Letter ID * Required Provide ONE of the following: Individual IL-PIN *				e this
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request at this time. Use the "Re Letter ID * Required Provide ONE of the following: Individual IL-PIN *				e this
request at this time. Use the "Re Letter ID Required Provide ONE of the following: Individual IL-PIN Required Look up my IL-PIN OR				e this
request at this time. Use the "Re Letter ID * Required Provide ONE of the following: Individual IL-PIN * Required Look up my IL-PIN				e this

- 08. If you choose to look up your Individual IL PIN click on 'Look Up My IL PIN.'
 - Enter your SSN and either your IL Driver's License or your most recent
 - Adjusted Gross Income Click 'Conduct Inquiry'
 - Copy your IL PIN and then click 'Back'

MyTax Illinois 📀	MuTavIllinoic
< Home	MyTax Illinois
IL-PIN Inquiry	
Enter the information below to get your IL-PIN. If you are married filing jointly, you will have to enter your spouse's information separately.	< Home
Social Security Number	
***-**-0000	
Choose an option for verification	Social Security Number: ***-**-0000
Illinois Driver's License Number 🛛 🛩	
Illinois Driver's License Number	IL-PIN: 0000000
A000-0000-0000	
I confirm that this information is associated with my Social Security number.	Back
Conduct Inquiry	

09. Enter your Letter ID and your IL PIN. When the screen expands, enter:

- Your contact information
- A username and password
- A security question and answer

testuser		
ck your passwor	d:	
Password		Password Rules
	0	Minimum 8 characters, no more than 20 Passwords must contain both letters and numbers
case you forget	your password:	 Passwords must contain both letters and numbers Passwords must be mixed case
Pick Secret Que	stion	
In what city	does your nearest sibling live?	×
Type Your Answ	ver	
Anytown		
confirm Info	ormation	
st@testing.com		
est@testing.com		

10. Click 'OK' on the next screen. You will receive email confirmation that your account was activated. Email <u>Rev.MyTaxHelp@Illinois.gov</u> with questions.



3

RESERVE YOUR CREDIT

Only donors who have activated an account with the Illinois Department of Revenue will be able to reserve a Tax Credit. If you have a Username from a previous year, log in using that Username and Password. If you cannot access your account, contact IDOR at 800-732-8866 to resolve this issue. If this is your first time logging into your account after creating it, you will need to enter the Activation Code you received from IDOR after your account was created.

Please make sure the name on your CAC matches the name on the bank or investment account from which the donation is being drawn. As a reminder, under the Invest in Kids Act, corporate donors are not permitted to designate tax credit scholarship donations.

Visit mytax.illinois.gov

12. If you have not already, set up two-step verification for your account. Add your email address and enter the security code sent to you.

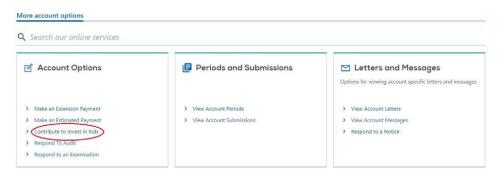
Privacy Policy Contact Help IDES Home IDOR Home		MyTax Illinois	2
MyTax Illinois	0	- Hylaxianois	•
< Home		K Two-Step Verification Setup	
Protect your MyTax profile with two-step verification Two-step verification is used to better protect your MyTax profile. Once we have it set you log in.		Verify Security Code An email with your MyTax security code was sent to julia@empower/linois.org. If you don't see the message, check your junk folder for an email from REVDORGRAPy@fillinois.org.	
Authentication App Use an authentication app, such as Google Authenticator, to get security codes.	Email Receive security codes by email.	Security Code * Required	
Set Up	Add Email	Didn't receive your security code? Resend	
	Cancel Confirm	Cancel	Confirm

13. Once logged in, you will be taken to your home screen.

- Click "view more account options."
- Please note if you are applying as a business, you will need to use a business account instead of an individual account.

		Welcome,
		You last logged in on Twesday. Sep 7, 2021 2:57:49 PM Manage My Profile
GLEN ELLYN IL 60137-4013		
Summary Action Center Settings	More	
Individual Income Tax	i and a second s	
	Account P60507328	File a Return Manage Payments and Returns
GLEN ELLYN IL 60137-4013	Balance	> View more account options
	\$0.00	
	1	

- 14. Under the "Account Options" section, click on "Contribute to Invest in Kids."
 - This will take you directly to the credit



- 15. The first screen of the application is an overview of the program.
 - It asks you to acknowledge that you are not permitted to take state tax credit for any contributions that you claim as a federal deduction.
 - Click the white and blue box to indicate you understand the restriction. Click the blue "Next" button in the bottom right corner.

Invest in Kids Overview						
verview						
 Public Act 100-0465 created the Scholarship Granting Organization 						
 The aggregate amount of all c taxpayers for which credits ma 					qualified contributio	ns made by a
 Two individuals filing a joint re 	turn shall be considered	one taxpayer for purpose	es of making qualified cor	tributions		
cknowledgement						

- 16. Confirm your donation will be contributed to an Invest in Kids Region
 - Check "Invest in Kids Region" and click the blue "Next" button in the bottom right corner.

Will your contribution be directe	d to an Invest in Kids Region or a Techni	cal Academy?		
Invest In Kids Region *		Technical Aca	* demy	
Cancel				< Previous Next

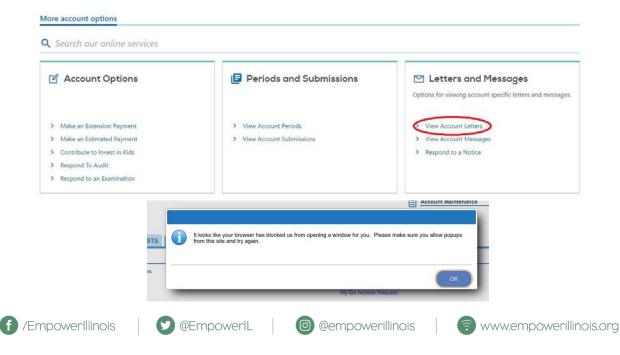
17. Fill out the requested information on the "Contribution" screen.

- Region and Scholarship Granting Organization of choice and the amount you plan to donate (contribution pledge).
- Please Note: this is the **TOTAL** amount you plan to donate in that region. You will then get a tax credit valued at 75 percent of that donation. Once filled out, click "Submit." You will then be prompted to re- enter your MyTax Illinois account password and click "OK." The final screen will be a confirmation that your application has been accepted.

Contribution Details			
Choose a Region *		Region Map	
Required	~		
Choose a Scholarship Granting O			
Contribution Pledge	~		
Required			
Confirm Amount			
Required			
Note: We reserve the right to	reduce your contri	bution amount if the region's limit for tax credits has	s been reached.
Cancel		0	< Previous Submit

18. Access Your Contribution Letter.

- On your mytaxillinois home page, click "View More Account Options." Then click
- "View Account Letters" (picture 1).
- Under "Letters" you will see your "Invest in Kids Contribution Application." **This is your CAC**. Click on the link to open a PDF of your letter.
- Please download and save the PDF, as you will need it for Step 24.
- If you have a pop-up blocker turned on, you may receive an error message. (Picture 2) Make sure you allow pop-ups for the mytaxillinois website.



Confirmation

You have successfully submitted your application for a Contribution Authorization Certificate under the Invest In Kids program. You will receive an email when your request has been fully processed by the Department.

Your confirmation number is 0-912-461-584

Submitted on: 9/7/2021 7:31:08 AM (Central Time) Request type: Apply for a Contribution Authorization Certificate Details of your request: Account number: P44757445 Tax year: 2021 Requested Contribution Amount: \$1,000.00 Region: Region 2 - Northern Counties Scholarship Granting Organization: EMPOWER ILLINOIS

No Illinois Invest in Kids credit may be taken for any qualified contribution for which a federal income tax deduction is claimed.

You may print this page for your records. This confirmation screen will not be accessible once you navigate away from this page. However, a record of your request will remain available in your account.

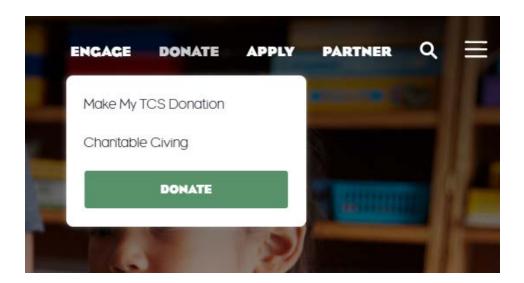
If you have questions, please visit our website at tax.illinois.gov or call us at 217 785-7313. Reference the confirmation number provided above.



MAKE YOUR DONATION

20. Visit EmpowerIllinois.org

• On the donate dropdown menu, click the donate button.



For more information or questions, please call (800) 616-7606 or email donors@empowerillinois.org.

21. Start your donation.

- You will be redirected to Empower Illinois' donation wizard, which will walk you ٠ through the next steps.
- First, make sure you have your Contribution Authorization Certificate (see this example), and click "I Have My Certificate."

I nank you for your interest in donating to the Tax C Illinois, You must have your Contribution Aut Department of Revenue to continue. @	redit Scholarship program through Empower thorization Certificate from the Illinois
Please make sure the name on your CAC ma investment account from which the donation Invest in Kids Act, corporate donors are not permit donations.	on is being drawn. As a reminder, under the

22. Enter the donor's email address.

DONOR INFORMATION	
Donor Email Address	
If you are filling this out on behalf of the donor, please use the donor's email address.	
NEXT	





23. Confirm or enter contact information.

If you are a new donor, or if we do not have a record of the email address you entered, you ٠ will be prompted to fill out a contact form.

Donor First Name	Done	or Last Name	
Donor Phone Number			
Street Address			
	Donor Phone Number Donor Address Street Address	Donor Address	Donor Address

- If you are a returning donor, we may have your email address and some other contact ٠ information on file. Please confirm you are the donor associated with the email you entered by selecting "Yes."
- If your contact information (phone number, address, etc.) has not changed since the last time ٠ you donated, leave the box unchecked and click "Next."

DONO	R CONTACT INFORMATION	
	back, Albert Einstein Based on your email address we have some of your formation on file.	
Are you All	bert Einstein?	_
My co	No No ntact info has changed since the last time I made a donation.	
My co		
	HEXT	

• If we have an incorrect donor on file associated with the email you entered, please select "No," and fill out the contact form.

DONOR CONTACT	INFORMATION	
Welcome back. Albert Einstein/ B contact information on file.	ased on your email address we have some of your	
Are you Albert Einstein?		
Donor First Name	Donor Last Name	
Donor Phone Number	Donor Email Address	
Donor Address Street Address		

• Please indicate whether you would like to donate by ACH, Check, Stock, Wire, or Credit Card, and click "Next."

EMPOWER ILLINOIS		
	DONATION TYPE	
	How do you want to Donate?	
	ACH Check Stocks Wire Credit Card	
	NEXT	
	If you need any assistance with this process, please contact us at	
	800-616-7606 or donors@empowerillinois.org.	
	©2021 Empower Illinois. All Rights Reserved.	6
	Privacy Terms Patent No. II,055,798 BI	🕜 Suppo

25. Enter the information found on your Contribution Authorization Certificate (CAC).

- Fill in the certificate number, donation amount, contribution due date (expiration date), and region found on your CAC.
- Indicate your donation type (individual or corporation/partnership/trust).

Please upload and enter information as it appears on your Contribution A	uthorization Certificate.
Certificate Number	
Donation Total Amount	
Contribution Due Date	
MM/DDAAr	
Select Region	
Select	\sim
How are you making your donation? (as a(n))	
Individual () Corporation, Partnership, or Trust (all types,	including

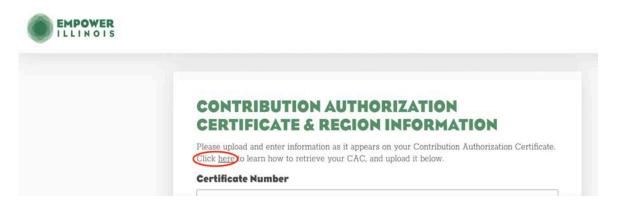
26. Upload your CAC.

• Upload both pages of your CAC. As a reminder, this is the electronic PDF file you received from the Illinois Department of Revenue.

• Once you see the option to "Preview Your CAC," you have successfully uploaded your document.

Donation Total Amount Contribution Due Date
Contribution Due Date
Donation Total Amount Contribution Due Date
Select Region
Select
How are you making your donation? (as a(n))
Individual Corporation, Partnership, or Trust (all types, including revocable)
Please upload both pages of your Illinois Department of Revenue Contribution
Authorization Certificate. Click <u>here</u> for step-by-step instructions.

• If you need help finding your CAC on mytaxillinois.gov and uploading it to the donor wizard, view our step-by-step guide.





27. Select school designation and donation amount.

- You can designate to a school or school system at any dollar amount, as long it does not exceed the amount listed on your CAC.
- If your gift is greater than \$1,000, you can designate to multiple schools.
- Click the "+" next to "Select another school, school system, or scholarship fund" in the middle of the page to designate to more than one school.

DESIGNATION INFORMATION
Please select the school(s), school system(s), or scholarship fund(s) you would like to donate to.
Only schools that have been recognized by the Illinois State Board of Education (ISBE) are eligible to receive donations to be used for scholarships under the program. Schools that are in "recognized." pending recognition," or "on probation" are considered recognized for these purposes.
Should there be a change in a school's recognition status, donations directed to any school not recognized by ISBE will be recategorized as undesignated donations for the same region in which the school is located, and made available to eligible students on a first-come, first-served basis.
Designation I
Select School School System, or Scholarship Fund
Enter the Amount for Designation I

28. Review donor authorizations.

Total Certificate Amount: \$100

- I authorize Empower Illinois to share my donation information with any designee(s) I have selected.
- I agree to the Empower Illinois Terms & Conditions and Privacy Policy. In particular, in the event that the amount of donations exceeds the number of scholarships needed by the particular school, school system or region, pursuant to Section 1000.2000x(5) of the Illinois Invest in Kids Act, I permit and authorize Empower Illinois to, among other things, use the contribution to award scholarships to eligible students to attend any recognized school in the same region or any recognized school in another region. In such an event, Empower Illinois will take into account then-current regulations and other guidance promulgated by the State of Illinois and any additional guidance provided by me as the donor in accordance with my contribution, including any particular school or region I selected at the time of the contribution.*
- Although it is Empower Illinois' goal to use my contribution at the particular school, school system or region that I have designated, in the event that the amount of donations exceeds the number of scholarships needed by the particular school, school system or region, I authorize Empower Illinois to use any remaining balance of my donation to fund scholarships for eligible students at other recognized schools within the same school system as the school(s) I have designated, if a balance remains at these school(s). Also, I would like my funds to be used for the upcoming school year.

NEXT

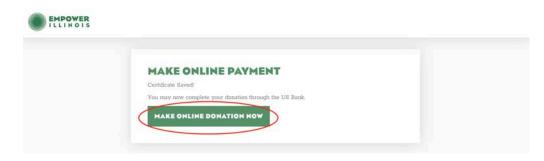
Please select your donation type below to view the last few steps of the donation process:



DONATE BY ACH

29. Make online donation.

• Once your CAC and designation forms have been saved, you can complete your donation through ACH bank transfer.



30. Complete payment and contact information, if not pre-populated.

Make a Payment		
	t i	
My Payment		
Empower Illinois Contrib	Region Region 1 Certificate Number 1234	
D	Designation 1 Altus Academy - Chicago signation Amount 1 \$100	
Payment Information		
	Frequent one Time Payment Amunt	
	Payment Date: Now	
Contact Information		
Contact Information		
	First Name	
	Last Name	
	Company (Optional)	
	Address 1	
	Address 2 (Optional)	
	City	
	State Select \$	
	State Select + Zip Code (Optional)	

31. Click "Continue."







DONATE BY CHECK

29. Mail your check to Empower Illinois.

- Because you have uploaded your CAC and designation form into the donor wizard, you will need to mail your check (made out to Empower Illinois) to PO Box 809001, Chicago, IL 60680-9001. Please include your CAC number on the back of your check.
- You do not need to print out this page and send it in with your check.
- Your donation has also been assigned a confirmation number. This number is for your reference and assures that we have received your CAC and designation form. This number does not confirm we have received your donation.

EMPOWER ILLINOIS	
	DONATION NEXT STEPS - CHECK
	Thank you for beginning your donation to the Tax Credit Scholarship Program through Empower Illinois. Your confirmation number is OyBUxBLLKA
	We have received your Certificate of Authorization (CAC) and Invest in Kids Tax Credit Scholarship Donation Form. In order to complete the donation, you must send in your check. Please make sure the amount on your check matches the donation amount you provided to us during this process, and mail it to:
	Empower Illinois PO Box 809001 Chicago, IL 60680-9001
	Overnight Packages should be sent to: US Bank Attn: Lockbox 809001
	5635 South Archer Avenue Chicago, IL 60638
	As a reminder, you must send in your check in order for us to finish processing your donation. We cannot issue you a Certificate of Receipt until the funds are received. You will receive a thank you letter from Empower Illinois when your donation is complete.
	PRINT



DONATE USING STOCKS AND BONDS

29. Complete your banking information.

		NOITA	
Expected Date Of Transfer			
Security Name	Ticker Symbol	# of Shares	
	Brokerage Conta		
	Security Name	Security Name Ticker Symbol + Add Another Marketable Security Brokerage Firm Brokerage Contac	Security Name Ticker Symbol # of Shares

30. Notify U.S. Bank of share transfer initiation.

- We ask that you or your broker immediately notify Lynda Arndt of U.S. Bank Trust upon transfer initiation of any shares (ACATS or otherwise). Please include your name (as the donor) and the shares you are transferring in the comments section of the delivery notice. This will help expedite the donation process.
- Please note that your donation has been assigned a confirmation number. This number is for your reference and assures that we have received your CAC and designation form. This number does not confirm we have received your donation.



DONATION NEXT STEPS - MARKETABLE SECURITIES

Thank you for beginning your donation to the Tax Credit Scholarship Program through Empower Illinois. Your confirmation number is Du3v7pLzi2 We have received your Certificate of Authorization (CAC) and Invest in Kids Tax Credit Scholarship Designation Form.

Please use the following instructions 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 not limited to Equities, Corporate and Municipal Bonds, Commercial Paper, Medium-Term 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 elivery notice. U.S. Bank is ACAT eligible, with participant number 2803. Please submit throug ACATS when possible and notify Lynda.arndt@usbank.com immediately upon initiation of the request

To deposit any Fed-eligible security:

Including all Fed-eligible Bonds, Bills, Notes, and agencies, including GNMAs 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 800-616-7606 or email donors@empowerillinois.org. A member of our staff will reach out to confirm when the stock has settled.

As a reminder, you must send us your marketable securities in order for us to finish processing your donation. We cannot issue you a Certificate of Receipt until the funds are received and have settled. You will receive a thank you letter from Empower Illinois when your donation is complete.

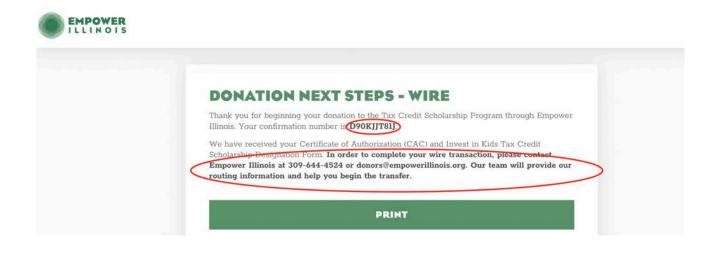
PRINT



DONATE USING WIRE TRANSFER

29. Contact Empower Illinois and begin transfer.

- In order to complete your wire transaction, please contact Empower Illinois at ٠ 800-616-7606 or donors@empowerillinois.org. Our team will provide the routing information to begin the transfer.
- Your donation has been assigned a confirmation number. This number is for your ٠ reference and assures that we have received your CAC and designation form. This number does not confirm we have received your donation.







DONATE USING CREDIT CARD

29. Make online donation.

-		
	MAKE ONLINE PAYMENT	
	Certificate Saved	
	You may now complete your Credit Card donation through the Elavon Portal.	
	MAKE ONLINE DONATION NOW	
	HARE ONLINE DOMATION NOW	
	If you need any assistance with this process, please contact us at 800-616-7606 or <u>donors@empowerillinois.org</u> .	
	©2021 Empower Illinois. All Rights Reserved.	
	Privacy Terms Potent No. II.055,798 BI	

30. Click "Checkout" to enter the hosted payment page.

Cancel Payment	EMPOWER ILLINOIS
	Make a payment
	Order Section
	Amount 200.00 USD
	Reference ID DROpcsdqkj
	CHECKOUT Empower Illinois 200 North LaSalle St, Suite 2310, Chicago, IL 60601
	Phone: 800-616-7606 E-mail: donors@empowerillinois.org

31. Enter your credit card information and click "Submit Payment."

	маке	a payment		
Order Section		Billing Address		
Amount Reference ID	200.05 USD DRICecentry	Conpany		
Payment Remeter CARD		Test Iza Europie St	Test	
	Object Care	Adjust2	5. 5.	60010
		Persignations		

32. Agree to the Terms and Conditions by checking the box and click "Submit Payment" again.

Order Section		Billing Address		
Amount Surcharge Fee (3.25%) Total of all charges and fees	200.00 USD 6 50 USD 200.50 USD	Company		inter and interest of the second s
Reference ID DROposidaji		Test Test		
Payment		123 Example St		
INVITENT CARD		Address2		
en 😳 🧮 🖘 🕮	Change Card	Cir Chicago Comis United States	LineProtect	Fund Cale 60010
0126		Provi Annua Best@empowenilinois.org Provi 11111111111111		
		Designations		
		Certificate Number		
		Tegir		