



## THE HERITAGE SCHOOL

Dear Friends and Family,

Do you want all of your state tax dollars to go to the state of Georgia, or would you be willing to divert a portion of your state taxes directly to The Heritage School? We appreciate your ongoing interest in, and support of, The Heritage School, and we hope that you will strongly consider the tax credit opportunity detailed below. By applying for a Qualified Education Expense Tax Credit and making a donation to our partner, Apogee Scholarship Fund, a state approved Student Scholarship Organization (SSO), you will be diverting your state tax dollars directly to The Heritage School and its students.

A donation to the Apogee Scholarship Fund will provide *you* with a dollar-for-dollar state tax credit and will enable you to divert a portion of your personal Georgia income tax away from the state of Georgia and direct it to The Heritage School to provide needs-based tuition assistance for future Heritage students.

In addition to the state tax credit, your contribution may be utilized as a 501(c)3 charitable contribution deduction on your federal income tax return.

Taxpayers who are married filing jointly are eligible for a tax credit of up to \$2,500; individual filers are eligible for a maximum tax credit of \$1,000; and C-Corporations may contribute and apply for a corresponding credit of up to 75% of their corporate state tax liability.

Tax credits are available up through December 31 of each tax year, up to a maximum cap of \$50 million per year, but in order to serve SSO-eligible applicants to The Heritage School for the coming school year, I urge you to apply for your tax credit now.

Please understand that this should not replace your annual charitable contribution to the school. This is simply a way to designate your already owed Georgia tax dollars to The Heritage School to benefit qualified new students.

Please review the enclosed materials and consider helping us in this exciting effort. If you have questions about this program, please do not hesitate to contact Amy Riley at The Heritage School at 678-423-5393, or Otis Jones at 770-683-9329.

***To donate/designate your Georgia tax dollars to The Heritage School, you will need to:***

1. Complete the donation form and have it notarized.
2. Complete Form IT-QEE-TP1; **be sure to sign** this form.
3. Make your donation check payable to: Apogee Scholarship Fund.

4. Mail the donation form, Form IT-QEE-TP1, and your donation check to:

Apogee Family Office, LLC  
3330 Cumberland Blvd., Suite 400  
Atlanta, Georgia 30339  
phone: 404-419-7123  
fax: 404-419-7101  
[scholarships@apogee360.com](mailto:scholarships@apogee360.com)

***Follow up instructions:***

1. When you receive the pre-approved document from the Department of Revenue, please file a copy in your 2011 income tax folder, so that you can claim the prepaid taxes on your Georgia income tax return for 2011.
2. Apogee will also receive a confirmation of pre-approval directly from the Department of Revenue on your behalf, which will be their notification to deposit your donation check.

Thank you for supporting The Heritage School in our effort to provide tuition scholarships for eligible students through the Qualified Education Expense Credit program.

Sincerely,



Otis Jones, Chairman  
Board of Trustees



Sharon Gruber  
Chair, Marketing &  
Development Committee  
Board of Trustees



Amy Riley  
Advancement Director